

Needs Based Sales Process

Following is a summary of the sales process I use with each client:

Disclosure – I provide written disclosure or letter of engagement to the client as an introductory to the sales process. This Document is signed by the client and a copy is retained in the client file.

Fact Finding – Sometimes I conduct a basic fact finding and other times I use more complex fact-finding tools depending on the situation of each client.

Needs Assessment - This is generally done completed as part of my fact finding exercise. I assess the needs of each client based on their circumstances and individual needs.

Recommendations and Advice - I document my recommendations and advice in client notes and provide enough information so that someone with similar knowledge knows why the recommendation was made to each client. I provide sufficient information to clients to help them make an informed decision about the products purchased.

Reason Why Letter - This is a brief summary document given to the client so that they have a quick reference as to what products they purchased and why the products were chosen. I also keep a copy of client notes on file for my records.

Product Information - Sometimes I use product brochures and information developed by the insurance companies and other times, I may use marketing information which I developed on my own.

Deepak Gohlan

Unit 101-10608 29 Ave NW
Edmonton, Alberta
T6J4H6

Cell: (647) 551-1467
Email: deepakgohlan@yahoo.com