

### Overview

The Senior Center System and Presentation is a creative way for Final Expense Specialists to generate what is the lifeblood of our business... the lead. With that being said, the Final Expense Specialist has to do some leg work in getting out to the places where seniors live and congregate. You will need to create relationships and follow the system step by step; from beginning to end. As a Final Expense Specialist, you will also still be running appointments with direct mail leads, telemarketed leads, referrals, etc., so you must dedicate and plan to spend at least one day each week to locate and prospect to the places we find groups of seniors.

So how do we find these places? First, you need to get to know your community.

There are several successful ways to find these senior locations such as:

- 1) The yellow pages
- 2) Internet searches/websites
- 3) Churches
- 4) Talk to the prospects we meet from other types of leads. Seniors know seniors, so as you get referrals, find out if they belong to any groups
- 5) Pay attention as you drive since you travel throughout your city daily
- 6) A magazine named Alternatives for Seniors that is a free directory for continues care communities, independent living, senior apartments, assisted living & nursing rehab centers. You can get your local copy at <http://www.alternativesforseniors.com>
- 7) Area agency on aging & neighborhood watch groups

The average success ratio we find is that one in four of these senior “places” will let you come in and do a presentation for their residents or group of seniors. You will want to be able to schedule and run 1-2 senior presentations each week. You can use any day, but Thursdays have been shown to be a good day to do senior center prospecting. So if you choose Thursdays as your day, then each week you need to call 8-10 of these places from Monday to Wednesday, so you can sit down with 2-3 service coordinators (the gatekeepers) every Thursday.

When you sit down with the service coordinator you will want let them know who you are, what your responsibility is, and exactly what you will present and what you're going to bring with you to the presentation. You want to find out from the service coordinator how many seniors would generally attend these types of presentations in their facility. You will increase your success ratio and book more presentations by making sure you're as prepared for the meeting with the service coordinator as you are for the actual senior presentation. Be prompt, courteous and respect their time. They largely hold the key to your success at their facility.

These are just a few of the field-tested suggestions to create success with this system. The bottom line is you always need to be on the lookout for places you can find groups of seniors. This is the key to the Final Expense Specialist's success with the Senior Center System!



Your first objective is to find out if the senior center will allow you to do a presentation. We haven't experienced many objections to a presentation. An occasional objection is that they feel like they can't allow just one company to be represented. Some may feel they are endorsing one company (you) over all of the other companies, and that's something they are not permitted to do. We are still working on a good way of handling that objection. Stay plugged into the program and together we will find it.

So your first step is to either stop by the center or make a phone call. Your first contact will typically be with the receptionist. Here's how it should sound.

### Script for the Gatekeeper

Hi, my name is \_\_\_\_\_ and I am a Final Expense Specialist specializing in plans for seniors. Some of your tenants may already be clients of mine, since I work in your area quite often. I would like to set up a short, no obligation meeting with your tenants/residents and provide them with free information about final expense plans to prevent their funeral expenses from becoming a burden to their families. I will provide a nice meal and drinks for everyone. Is there a way I could set up this informational meeting? Who would I need to speak with?

Be very short and to the point. You have 2 goals here.

- 1) To find out if the facility will allow you to do a presentation.
- 2) To find out the name of the person that you need to speak with to set up your presentation (usually the service or social coordinator).

You want to set up the presentation ASAP after you get the OK. Generally this can be anywhere from a week on up to a month later. If you set it up several weeks after your initial visit, you will need to stay in contact with the service coordinator on a weekly basis. The best suggestion we have for a presentation that is going to be several weeks out is to leave a sign-up sheet with the service coordinator. This way the seniors can sign up in advance to let you know who will be attending. This is also a reminder to the seniors that they have committed to being there and gives you a good idea of the total count so you know how many informational packets you need to prepare, and how much food you need to bring.

**Key Point:** Seniors don't come for the information; they come for the free food! It's the Final Expense Specialist's job to make sure that by the end of the presentation these seniors realize that having their final expenses taken care of is more important than a free lunch. Your actual presentation to drive this point home should be no longer than 10 to 15 minutes, and you never serve the food until after you have made your presentation.

