

SELLING GUIDE

For Agents Offering Travel Insured Plans



Find the Right Plan

Help direct your clients towards the right plan by finding out:

- Where they are traveling to
- What their major concerns are for travel protection (cancellation, job related, weather) How many travelers are going with them

Get a Quote

To get a quote for your client, you will need to have this information:

- State of Residence
- Travel Dates
- Travelers' Ages or Dates of Birth—at the time of booking
- Trip Cost Per Person (air, cruise, tour—anything that is prepaid and nonrefundable) Deposit Date: This is the first day they made a payment towards the trip. Destination

Purchase the Plan

Once the client decides on a plan, here's what you'll need from them:

- First name and last name (middle initial is optional) Date of birth
- Email address—must be the clients
- Phone number—mainly for claims purposes
- Street address and zip code
- Credit card number and expiration date

Mention the 14-Day "Free Look" Period

14-DAY "FREE LOOK": If you are not satisfied for any reason, you may cancel your plan by giving the company or the agent written notice within the first to occur of the following: (a) 14 days from the effective date of your plan; or (b) your scheduled departure date. If you do this, the company will refund your plan cost provided no insured has filed a claim.

TIPS TO INCREASE SALES



Pick one.

We know travel protection can be confusing, so pick one product, from one company, and you'll be amazed at how much easier it is to explain the benefits and make the sale.

Ask for permission.

When you first meet with a client you always ask about what should be included in their trip plans—make sure travel protection is one of them. Explain that travel protection consists of travel insurance benefits and non-insurance assistance services.

Include a price quote.

They gave you permission—now you must follow through!

Tell your client: “Your total trip cost including taxes, agency fees, and travel protection will come to \$X.”

Put the information in their head.

Use one of our easy email quote options to get the information clients need, and guarantee that you will receive credit for the plan if they book online themselves.

Always protect yourself with a waiver.

Not every client will purchase travel protection. Waivers for declining travel protection not only protect you but act as a great tool to reinforce how important travel protection truly is.

OTHER TOOLS TO HELP YOU SELL

Email Quotes

If you quote your client for travel protection but they didn't purchase yet, you can save their quote and email it to them so they can review it at home.

Post Quote Email Series

Our popular email quote program reminds your clients not miss out on important deadlines and to purchase their plan – so you don't have to remind them yourself!