

HAVE  
YOU  
HEARD

## Instant Upload Now Available for Customer Service Forms

Our Instant Upload capability for New Business forms has been so popular, we've expanded it to include Customer Service forms too!

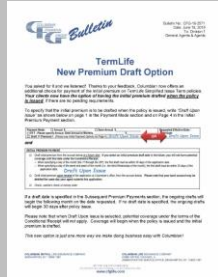
[Watch Video](#)



## New Premium Draft Option for TermLife

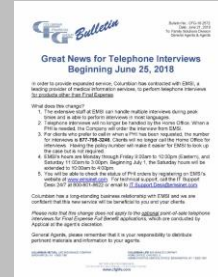
Thanks to your feedback, Columbian now offers an additional choice for payment of the initial premium on TermLife policies.

[Learn More >>](#)



## Great News for Telephone Interviews

In order to provide expanded service, Columbian has contracted with EMSI to perform telephone interviews for products other than Final Expense. [Learn More >>](#)



## Experience the Warmth of Montego Bay

The Family Solutions Sales Conference will be here before you know it.

[Learn More >>](#)



IN CASE  
YOU  
MISSED IT

The Final Expense telephone interview is now optional! Save time on your appointment and confirm coverage on the spot without needing to call for an interview. Download the CFG Final Expense Calculator to access Columbian's great underwriting tools. If you haven't started using these great tools, now is the time to start! [Learn More >>](#)

[Download iOS](#) | [Android](#) | [Desktop](#)

## Sales Idea of the Month

### After the Appointment

Some sales people feel that their connection to a family has officially ended as soon as they have thanked them and said goodbye. However, there is one more important step to follow in order to provide truly extraordinary service. Regardless of whether a family has purchased a plan from you or not, going out of your way to keep in contact with your families shows them that they are unlikely to receive such extraordinary service from anyone else. You need to do more to stand out in the crowd. It takes work to keep a relationship going and growing. Remember that people buy from people they *like*, *trust*, and *respect*.



### Like

A customer may not necessarily become your friend, but they do want to feel comfortable with you and feel like they have a connection with you. They want to know that you are being yourself and that you can listen to and respond to their needs.

### Trust

Trust is the basis for all sales relationships, especially those that include long-term commitments.

### Respect

Customers will respect you when you are prepared, professional and knowledgeable about your products and services. They will respect you even more when you take the time to follow up with them after the appointment.

### Types of follow up

Our best producers always follow up with families that they have seen. Thank you cards and follow up letters are two of the most successful forms of follow up.

#### # 1. Thank you cards

Thank you cards should be mailed to families that have purchased a policy. When writing a thank you card, you need to follow these basic guidelines:

- Thank the client for their time.
- Commend them for their purchase.
- Let the family know that you are available to help them again in the future.

#### # 2. Follow up letters

Follow up letters are sent to families that have or have not purchased a policy. These letters are meant to reinforce the purchase or to leave the door open for them to contact you should their mind or situation change. It may not happen tomorrow, but when it does, you are going to be the person that they will call!



**Keeping business simple for your success.**

Columbian Life Insurance Company is not licensed in every state.