

Presenter Evaluation Form

Presenter Name: _____

Client Name: _____

City/State: _____

Presentation Date: _____

Immediate Enrollment: Yes No

Follow-up Date: _____

1. Based on the presentation given to you today, do you feel like you have a good understanding of the Legal Shield membership? Yes No

2. Was the presenter clear in explaining the plan benefits? Yes No

3. Whether or not you enrolled with the services today, do you feel that the information presented to you was helpful and beneficial for you to know about? Yes No

4. Based on the presentation given to you today, do you feel that others would benefit from knowing about Legal Shield services? Yes No

5. Our Associate's performance is evaluated based on the amount of referrals he/she receives from each presentation. Would you be willing to give the presenter any referrals that he/she could explain these services to? Yes No

Recommendations (people who are intelligent, open minded, on top of things)

1. Name: _____
Phone Number: _____
Relation: _____

6. Name: _____
Phone Number: _____
Relation: _____

2. Name: _____
Phone Number: _____
Relation: _____

7. Name: _____
Phone Number: _____
Relation: _____

3. Name: _____
Phone Number: _____
Relation: _____

8. Name: _____
Phone Number: _____
Relation: _____

4. Name: _____
Phone Number: _____
Relation: _____

9. Name: _____
Phone Number: _____
Relation: _____

5. Name: _____
Phone Number: _____
Relation: _____

10. Name: _____
Phone Number: _____
Relation: _____

NOTE:

You can ask questions to ask to help them complete the list of 10 referrals:

Who do you know who:

- has recently had a baby?
- has teenage drivers?
- drives like a teenager?
- recently purchased or about to purchase a home or car?
- has been a victim of IDT?
- has been audited by the IRS in the past? (likely to happen again)
- is getting a divorce or has divorce or child custody issues?
- has had a speeding ticket?
- has approached you for advice in the past?
- has recently had an automobile accident?
- needs to get their Will and Living Wills prepared?