

# Qualifying the Prospect

START

## TECHNIQUES

## TOOLS

1

Explore client needs

- Ask the **right** questions
- Use **open-ended** question format
- **Listen** – identify the real challenge they are trying to solve

Good Fit Discussion Guide

2

Confirm client's objectives

Focus on the client's **strategic objectives** to confirm the challenge you are trying to solve

myFlex Decision Tool

3

Identify the right product

Work with Equitable Life to develop your plan design recommendations

myFlex Decision Tool



FINISH