Rapport must be conversational but it must also be intentional. The key is to find common ground for conversation.

Building Rapport

Since you are walking into a business, you have occupation as a point of discussion. However, building rapport is also about being observant. As you walk up to the desk or counter, look for something that gives you an indication about this person’s family (pictures with a husband/wife, kids, grandkids and even pets). Or, look for something that gives you an idea about this person’s recreational activities, for example sports memorabilia, pictures of them fishing, etc. With this information you can discuss things that you know are of particular interest to engage them.

Tips:

Pick your gatekeeper – doesn’t always have to be the person sitting at the front desk upon walking in.

Rapport Tips:

I. Ask the gatekeeper – “How are you doing?”
   a. This allows the agent to keep the control by being the first person to talk.
   b. It is cordial – creating a positive tone for initiating rapport
   c. This buys time for the agent to find something to talk about

II. Statements, compliments, yes/no questions can be used to initiate conversation, but do not usually prompt the gatekeeper to volunteer information.

III. Weather can be considered generic rapport – try to add more depth to the conversation

IV. Ask open-ending questions – use the following prompts to create an open-ended question which will allow the gatekeeper to respond with more substance:
   a. Who
   b. What
   c. Where
   d. Why
   e. When
   f. How
   g. Tell me about _______
1. Build Rapport with Gatekeeper

2. Ask for the Decision Maker and Disengage

Agent: “Would you let ______ (Decision Maker’s first name) know that _____ (your first name) is here?”
» Disengage

3. Answer Gatekeeper Questions and Disengage

Gatekeeper: “Who are you with?”
Agent: “Liberty National”
» Disengage

Gatekeeper: “Do you have an appointment” or “Are they expecting you?” or “What is this about?”
Agent: “I need to speak to ______ (Decision Maker’s first name) directly.”
» Disengage

**Disengaging Tips**

» Begin to disengage as you are asking for the Decision Maker to make a smooth transition when disengaging
» Break eye contact using your phone
» After asking for the Decision Maker – walk and sit down in waiting area
» Speak with your partner, if applicable

Don’t:
» Square up body with the gatekeeper making it difficult to turn away
» Put presentation on counter when asking for the Decision Maker

GATEKEEPER RAPPORT SCRIPT
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