

## 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: \_\_\_\_\_

2. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

3. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

4. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

5. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

6. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

7. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

8. Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relation: \_\_\_\_\_

9. 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?