Alta Vida Agency Qualification Questions

Alta Vida Unlimited – Agency Discovery Application

This is not a form. It's an invitation.			
Please answer in your own words. Save your answers as a PDF or Word document, and send them to: results@altavidaunlimited.com			
("We don't chase agents. We select the right ones.")			
(S) Vision & Values			
1. What inspires you to serve in the health insurance space?			
2. How does your agency elevate the lives of the clients you touch?			
3. What does the phrase "ethical sales" mean to you?			
✓ Performance & Integrity			
4. What is your current monthly close rate from inbound leads?			
5. What's your average response time when a lead is assigned to you?			

6. How do you ensure consistent follow-up without pressure tactics?

	7.	Have you ever been awarded an exclusive territory before? If so, what did you learn?
£	o _l	perations & Systems
	8.	What CRM or dialer do you currently use to manage leads?
	9.	How many agents are on your team, and how do you train them to stay compliant?
	10.	. What systems do you have in place to ensure timely contact with warm leads?
\bigcirc	Re	eputation & Legacy
	11.	. What do you believe clients say about you after working with your agency?
	12.	. How would you like to be remembered by the families you serve?
	13.	. Have you ever had a client come back years later and refer someone? Tell us about that moment.
) Te	erritory Commitment
	14.	. Are you currently working leads in the territory you're applying for? If so, what's your average cost per lead and ROI?

	15. If selected, how will you protect the honor of exclusivity we extend to you?
	16. What city and ZIP codes would you like to be considered for?
<u></u>	Soft Qualifiers (Heart-Centered)
	17. Why do you believe you're a fit for Alta Vida Unlimited?
	18. What does the phrase "Serve to Close. Educate to Earn. Deliver to Grow." mean to you?
	19. How do you bring peace or clarity to a client who is confused or overwhelmed?
	20. What legacy do you want to leave in your territory?
**	Who You Are
	21. Who are you when you're at your best in service to others?
	22. What led you to insurance, and what keeps you here?
	23. What does the word "protection" mean to you — beyond policies and premiums?

1 Your Practice	
24. Tell us about your team, your systems, and how you approach follow-	up.
25. What's your close rate? How do you build trust before you even talk nu	ambers?
26. Do you have a CRM or lead nurturing process?	
27. If so, how is it working for you?	
Territory & Vision	
28. Which city or ZIP codes are you applying for exclusive rights in?	
29. Why do you believe this territory will thrive under your care?	
30. How would you protect the integrity of this exclusive opportunity?	
Clients & Culture	
31. How do you feel about your clients working with them?	
32. Do you have a story where you went above and beyond — just because	it was right?

33. How do you stay compliant, ethical, and heart-centered under pressure?
7 Legacy & Alignment
34. What kind of legacy are you building through your agency?
35. What's the best compliment a client (or their child) ever gave you?
♣ Submission Instructions:
Once complete, send your answers to:
results@altavidaunlimited.com Subject line: [Your Name] – Alta Vida Agency Consideration
Optional: include your website, marketing samples, testimonials, or client letters. We want to know <i>you</i> .
Final Words:
We're not looking for everyone.
We're looking for <i>the one</i> in your city. Someone who doesn't just <i>want</i> exclusive rights — but <i>earns</i> it every day through service,
compassion, and clarity. If that's you we're listening.