



## Value Based Agency Presentation Resources

Below are resources for a revised NAIFA Agency Presentation. This was put together primarily by Dennis Cuccinelli, from our New Jersey State Association (thank you Dennis!). What follows below is an email that Dennis has had success using to arrange agency presentations, and a bullet point style outline of how he gives this new agency presentation.

This was developed to mirror in a group setting what the new NAIFA Membership Sales System does in a one on one setting. The idea is to help the attendees to uncover the value that NAIFA can bring to their career (with some guidance from us).

This presentation is a departure from our traditional approach. We are getting away from the laundry list of benefits that we think should be enough to get them to join. We are deemphasizing advocacy as the primary driver and focusing on career success as the motivator to join.

### Some notes about the Presentation Outline

- This is not a script. This is how Dennis delivers it, and it should serve as a skeleton. Feel free to use any of the language, or use your own, it's the approach and flow that is relevant.
- This is designed to be short (about 20 minutes total) and **NOT A POWERPOINT PRESENTATION**
- At the risk of being repetitive **THIS IS NOT A POWERPOINT PRESENTATION**, it's a conversation
- No we will not be building a new Agency Presentation PowerPoint to support this
- The handout that Dennis made for these presentations is included in the same email that you received this document in.

### Dennis's email to arrange agency presentations (Follow up to a phone call)

Thanks for taking my call today. *(Or, Following up on my voice message.)* This is to confirm *(or request time to speak)* my twenty-minute presentation on the income producing benefits of NAIFA.

While many things at NAIFA have remained the same, much has changed. Our government relations and advocacy remains strong. The big change for NAIFA is our renewed focus on benefits that every producer, including those you manage, can use to increase their income. We have time management programs and prospecting programs (live and on the web) designed for financial services professionals. These can easily lead your producers to additional sales and additional selling-time. NAIFA's Virtual Library is second to none, and we are continuing to grow our training & coaching resources, so that you agents stay ahead of the curve.

Add sign off sentences. Don't thank the manager. Use reinforcing statements, such as: Looking forward to providing your producers programs that will help move them forward.



## Value Based Agency Presentation Outline

### Introduction

- Ask the manager for a one to two minute introduction that includes a positive statement on NAIFA.
- Introduce yourself and give a NAIFA overview statement a simple “NAIFA is the professional association for anyone in the insurance and financial advising business”, will do.

### Opening (3 Minutes) - Review NAIFA’s Government Relations (GR) efforts in DC and your state (keep it short!)

- Many people know us through our advocacy and GR work. (do the **very** quick review here)
- End the initial part of the presentation with a statement on advocacy: “Advocacy is a silent benefit. It may not affect you every day, but it is where NAIFA has the most impact on the present and future of the industry. Our members know how important it is, and that’s why NAIFA is the largest industry lobby group on Capital Hill”
- Transition to other benefits: In addition to the advocacy and GR work, our members are huge fans of the benefits that increase their income and help them better serve their clients. Let’s discuss how NAIFA can increase your income and make you a better advisor.”

### Main Presentation (10 – 12 Minutes) - Discuss how NAIFA’s educational content can put dollars in their pockets

- Use leading questions to engage the attendees. “Think about your last few sales. What was the average commission?” “Think about your average weekly income. Would an extra week each year be of value to you?”
- Link those concerns and desires to be a better agent to NAIFA value by explaining how NAIFA programs are built to address the business challenges of agents at all stages of their careers. You can highlight the recent Time Management and Prospecting programs (on-line and workshops), discuss the virtual library and make sure to mention the value of other NAIFA members as resources.

### Closing (3 – 5 Minutes) - Discuss the value of the NAIFA benefits in *your* practice and how the increase in income is offset by the “membership fees” ten-to-one.

- Use a real life story. Nothing explains the value better than telling someone what it means to you personally. Don’t be afraid to go deep here. “My kids owe their college education to what I learned through NAIFA”
- Make it personal to them. “Earlier I asked about your average commission and average weekly commissions. What is an extra week of time and extra sales worth to you? \$2,000 to \$5,000? NAIFA membership is a small fraction of that. Now I want you to do some quick math and compound those increases over the lifetime of your career. That’s why NAIFA membership is such a smart business decision.”
- Mention that you have applications for those who are ready to join and it’s ok if they aren’t ready right now, we’ll be reaching out to you over the next few weeks to discuss NAIFA value.

### Do’s and Don’ts -

- Do some pre-work and know something about the manager and/or office and use that information in a way that promotes the value of membership and/or the manager’s/office’s commitment to NAIFA.
- Don’t use the word “dues”(what you owe us), use “membership fees” (what you pay to belong).
- Don’t talk about the total membership fees amount, use the monthly number.
- When people start handing you applications, reinforce their decision. “You will not regret becoming a member”. Or, “This is a good business decision”.