

How To Give An Effective Agency Presentation



By, John Davidson

Pre-Meeting

- Contact agency manager or general agent.
- Set a date and prepare an agenda.
- Order NAIFA membership marketing materials by calling
877-TO-NAIFA/(1-877-866-2432).



Pre-Meeting Continued

➤ Order LIFE materials by calling
1-800-268-7680.

➤ Visit:
www.naifa.org/why_endorse.html

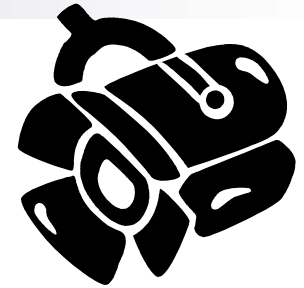
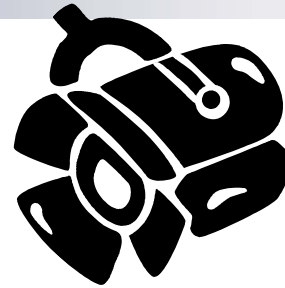


Get a Solid Commitment

- Ensure the manager will promote membership.
- Make joining easy.



SHOWTIME



- Arrive Early
- Organize your materials.
- Offer a small incentives to encourage prospects to join.
- Place handout materials on the tables and chairs prior to beginning your presentation.
- Mingle with the group during the break.
- Find a couple of prospective new members who will respond to your call during the presentation.



INTRODUCTION

- Tailor to type of business.
- Be introduced as “an agent, just like you!”
- BE UPBEAT!!!!



Tell Them Why You Are There Today

- Say, “Today, I will:
- Tell them to start filling their applications out and offer a gift to the first five applications you receive.



Begin Your Formal Presentation

- Ask a disturbing question
- Bring up a current legislative issue to immediately get their attention about the seriousness of why you are there



Formal Presentation

- Show the “I am NAIFA” video early in the presentation.
- Ask them to fill out the application in the beginning of your presentation and tell them you will collect within the next 10 minutes.



Formal Presentation

- Give a couple of quick sales ideas.
- Hand out Advisor Today magazines
- Talk about LIFE
- Lead right into “The Value of NAIFA” video.
- Praise and Thank their company and managers
- Invite the new members to attend their next local NAIFA association meeting and explain how to get involved.



Presentation Do's

➤ DO

- ✓ Confirm the time, date, number of attendees and location.
- ✓ Have commitments from management for support and dues payment arrangements.
- ✓ Create a positive atmosphere.
- ✓ Tell them you need the application by the end of the presentation
- ✓ Ask the managers at the end of the presentation for help collecting the applications.



Presentation Don'ts

➤ Don't

- ✓ Get used as a commercial. Choose your time slot on the program/agenda carefully.
- ✓ Make your presentation without enough time to make a strong, thorough pitch for NAIFA membership.
- ✓ Argue with hecklers.
- ✓ Make disparaging remarks about non-members or those in the meeting who decide not to join.
- ✓ Leave without completed

