Seven Power-Plays

For The New Insurance Agent

The Top Seven Most Important Aspects For Insurance Agents To Master.





Hello and Welcome!

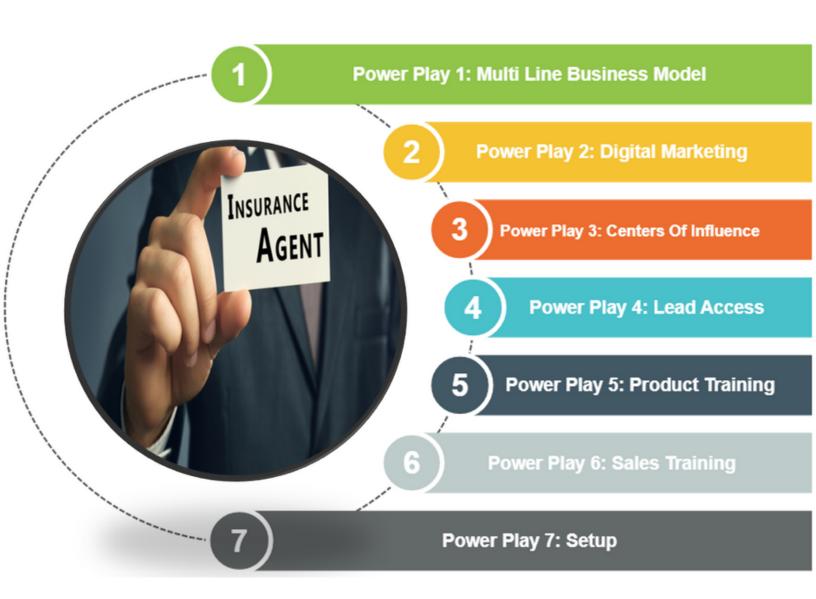
Premier Insurance Contracts' desire with this information is to educate and guide you to give your customers the best products, services, and information.

Through the years, we have learned what it takes to be a successful agent, and through The Seven Power Plays training, we will help you master each of these steps.

You'll learn about the most important aspects of being an insurance agent, from mastering sales techniques to building a solid agency.

We are eager to see you get started. Let's go!

WHAT TO EXPECT



A Multi-Line Business Model

- Affordable Care Act
- Medicare Advantage
- 3 Annuites
- 4 Final Expenses
- **5** Life Insurance



1 Multi-Line Business Model

As life and health insurance agents, we hear that sticking with one type of product is the easiest, well, it might be the easiest, but the most successful agents have a Multi-Line Business Model.

We want you to honor your license by using it for what it's worth, life, accident, and health.

You can sell:

- 1. Affordable Care Act- HealthInsurance for Individuals under65
- 2. Medicare Advantage-Health
 Insurance for Individuals over 65
- 3. Annuities-long-term retirement investment
- 4. Final Expense- Covers expenses for a funeral
- 5. Life-Death Benefit policy

CERTAIN PRODUCTS WORK WELL TOGETHER.

- ✓ Products that involve the same type of customers
- ✓ Products that move your same customer from one type of product to another

Cross-Selling Products

PREMIER INSURANCE CONTRACTS, INC.	Medicare Advantage	Stand Alone Part D	Medicare Supplement	Annuities	ACA	Life Insurance	Final Expenses
Medicare Advantage							
Stand Alone Part D							
Medicare Supplement							
Annuities							
ACA							
Life Insurance							
Final Expenses							

MUST

GO FOR

• TENTATIVE

• STAY AWAY

2 Digital Marketing

Digital marketing is the process of using online channels to promote and sell products or services. It's a broad umbrella that includes everything from search engine optimization (SEO) to social media marketing.

So why do we emphasize
Digital Marketing for Insurance
Agents?

- Lead Generation
- Marketing Cost Flexibility
- Search Engine
 Optimization
- Business Exposure
- Build Reputation



WHY DIGITAL MARKETING

For Insurance Agents

To Develope:

• Lead Generation

Marketing Cost Flexibility

Search Engine Optimization

Business Exposure

Build Reputation



Strategy and Plan



Insurance agents have begun using social media to connect with potential and current clients to stay ahead of the competition.

However, many agents feel unsure how to get started or where to go with what they currently have.

Premier encourages agents to develop digital marketing skills and provides many resources to create digital strategies and plans.



3 Centers of Influence

A Center of Influence (COI) is somebody in a position to refer business to you.

- The key is to develop a relationship with people in regular contact with individuals and businesses that would use your products or services.
- When you build a reputation as a go-to source of information and assistance, your COIs will be more likely to refer you.
- We have identified seven groups you need to ensure you are networking and associating with as a life and health insurance agent.



The best COIs for agents are people who share their values

-AL CASTELLANOS

CENTERS OF INFLUENCE

ARE YOU NETWORKING WITH:

- Tax Preparers
- P&C Agents
- Accountants & CPA'S
- Medical Centers / Doctors (MD)
- Estate Planning Lawyers
- Club Membership Affiliations
- Senior Affinity Groups/Org.
- Senior Dwelling Facility



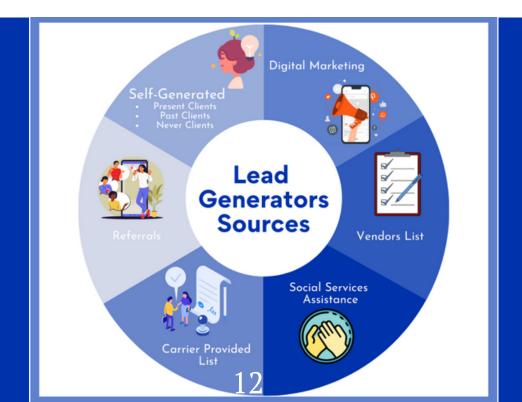
4 Lead Access

Lead Generation is one of the most important jobs as an insurance agent.

You only have three options **REFERRALS**, **CANVASING**, or **PURCHASING** leads.

 Referrals tend to come from either personal contact or a relationship you have developed with a center or influence.

- Canvasing is working through your own personal contacts and finding leads.
- Purchasing leads is a great way
 to jumpstart your business, but
 remember, leads are not
 created or distributed equally.
 Unless specifically stated, most
 purchased lead lists are shared
 with several other agents. Paid
 Ads are a great way to own
 your leads.



5 Product Training

Being properly educated and trained is by far one of the most important assets an agent can have.

Align yourself with organizations that care about informing their agent. Product training helps you understand the product you are selling inside and out. Our training covers various topics, from how to use carrier portals, carrier-specific plans, and how to sell a type of product. We divide Product Training into two categories:

- FMO Provided -Products/Plans are evaluated and criticized by insurance agents for training purposes
- Carriers Provided- A carrier provides agents with product/plan training.



Extend and Grow your Life and Health Career with

DESIGNATIONS & CERTIFICATES

01.

WMCP®

WEALTH MANAGEMENT CERTIFIED PROFESSIONAL® 02.

RICP®

RETIREMENT INCOME CERTIFIED PROFESSIONAL®

03.

CFP®

CERTIFICATION EDUCATION PROGRAM

04.

ChFC®

CHARTERED FINANCIAL CONSULTANT®

05.

CLU®

CHARTERED LIFE UNDERWRITER® 06.

FSCP®

FINANCIAL SERVICES
CERTIFIED PROFESSIONAL®

07.

ChSNC®

CHARTERED SPECIAL NEEDS CONSULTANT®

08.

CLF®

CHARTERED LEADERSHIP FELLOW®



6 Sales

So you have a lead and understand how you can help your clients; now, how do you convert this into a sale?

That's the importance of sales training. Sales training should help you sell better, overcome objections, develop your listening skills and improve in-person selling techniques.

Look for mentors, podcasts, and books that will increase your knowledge on techniques for you to close more sales. Premier Insurance Contracts provides our agents with several types of sales training and courses like:

- 48 Closing Strategies
- Sales Kajabi Courses
- Live Weekly Training
- On-Demand Sales Events



"A good insurance agent is always learning and constantly trying to improve their sales skills."

Sales Training



Recommended Books

for the Life and Health Insurance Agent

- How to Win Friends & Influence People By Dale Carnegie
- Secrets of Closing The Sale By Zig Ziglar

- The Little Red Book of Selling
 By Jeffrey Gitomer
- The Greatest Salesman in the World by OG Mandino

Pitch Anything By Oren Klaff The Psychology of Selling By Brian Tracy

7 SETUP

License Administration

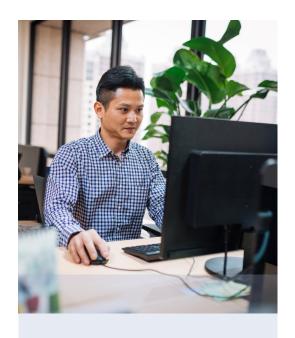
Administering your license helps you stay in compliance and most other license processes with platforms like Sircon or NIPR.

2 Errors and Omissions

Purchase coverage that protects you from being sued for negligence or breach of contract with companies like NAPA.

Continuous Education

Complete and stay current with the required Continuous Education.



"a well-configured agency will ensure your success in this industry."

-AL CASTELLANOS

CONNECT YOUR



With **Premier Insurance**

Benefits of Connecting:

- Help You Stay In Compliance
- Assist with License Renewal
- Review Continuing Education Info
- Send License Reminders
- And Much More!



Errors and Omissions

An E&O policy aims to protect the insurance buyer, protects you from any wrongful accusations, and provides some financial relief during those times.

Our agency recommends **NAPA** to all of our new agents.

COMMON CLAIMS

- Failure to MaintainAppropriate Coverage
- Failure to Correctly Explain Clients Coverage
- Administrative Errors
- Failure to Share Policy Changes

TOP E&O CLAIMS AGAINST AGENTS!

Continuing Education

Most states have insurance continuing education requirements to keep your license in effect.

We recommend that you double the requirement during the first six years (3 license renewals) of having your license.

We believe this will help ensure you get the proper education and grow as fast as possible.

Be strategic in selecting your courses, so it aligns with your business plan.



- ✓ AINFE offers bi-weekly free continuous education for all contracted agents with Premier Insurance Contracts
- Over 20 Approved Course in line with Life and Health Insurance Agents
- ✓ Spanish Continues Educations available at the end of 2022

Thank you!

The insurance industry is constantly changing, and you need to change with it as an insurance agent. We want you to dominate this industry and become a high-earning, successful agent. Use our program to ensure your success.

We have had numerous insurance agents who have taken our course and seen tremendous success.

We want you to be next!



Do You Need More Help?

Schedule a Call

If you're looking for an insurance agent career or are a current insurance agent and want to increase your sales, contact

Premier Insurance Contracts today!





