



PeopleFirst: Development

DI Sales Training Basic Session 2

Proposals and Presentations



Agenda

Review of Basic Session #1 – The Need for Income Protection

- Prospecting versus Storytelling – “A good salesperson finds the need, a great salesperson creates the need”Tell a story!
- Sales Idea – “Gone with the Wind”
- Homework – Get proposals ordered from the NFP DI Business Center

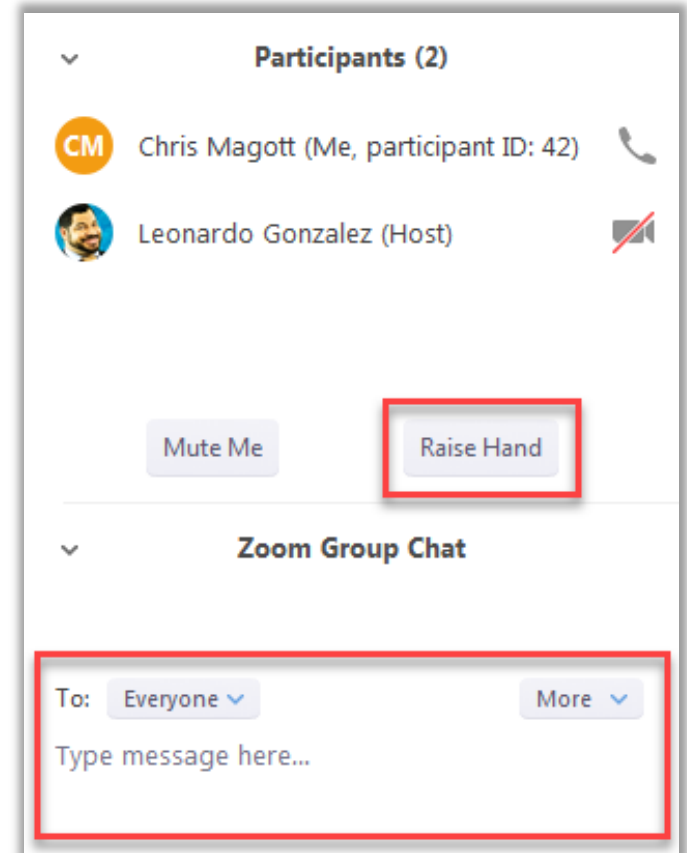
Proposals and Presentations

- Proposals
- Applications
- Sales Idea – “To Consult or Not to Consult, That is the question?”



Intro - Set Up

- 1 hour meeting
- Virtual Classroom
 - Take notes
- Questions?
 - Click the “Raise Hand” button to let us know you want to speak.
- Chat
 - Use to message the host or other participants



Proposals

- NFP DI Business Center
- Request for Proposal

- DI Fact Finder
- Marketing Resource Library



Proposals

Basic Client Information	Plan Design
Name	Monthly Benefit
DOB	Elimination Period
Gender	Benefit Period
Income	Total Disability
Occupation	Residual
Smoker Status	Cost of Living
Other In-force Disability	Future Purchase Option
Overall Medical History	Catastrophic



Applications

- NFP DI Business Center
- Core Partner Disability Applications



Sales Idea

- To Consult or Not to Consult, That is the Question
- [DIAM Microsite](#)
- Intermediate – Session #1, June 5th @ 2pm CENTRAL
- Make three (3) presentations from the group of proposals you developed.
- Give me a call to strategize and prepare 512-697-6185 or khoffman@nfp.com.

