

# Your Perfect Insurance Presentation

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The following presentation builder is designed to help you organize your insurance product, make it simple to understand and to increase prospect to client conversion. Understand each type of product you offer should have its own presentation. No matter what insurance products you promote and even though some products are more complex than others, this format gives your prospect more clarity on why they should buy from you and not the competition.

Also, human conversations do not always go as planned and more questions may be asked while you are trying to present. Be sure to pivot and keep the flow of conversation going. As long as you have covered all the slides in order, you should have a client ready to buy your product and apply for the coverage.

*p.s. - this can also work for training other agents.*

- Leo Bados Jr.

This presentation belongs to : \_\_\_\_\_

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Slide 1: The Introduction.

**(TYPE OF INSURANCE)**

---

**PRESENTED BY:  
(YOUR NAME OR  
COMPANY NAME)**

What type of product are you wanting to make a presentation for?

----- is your type of Insurance.

What Is your name or company you work with?

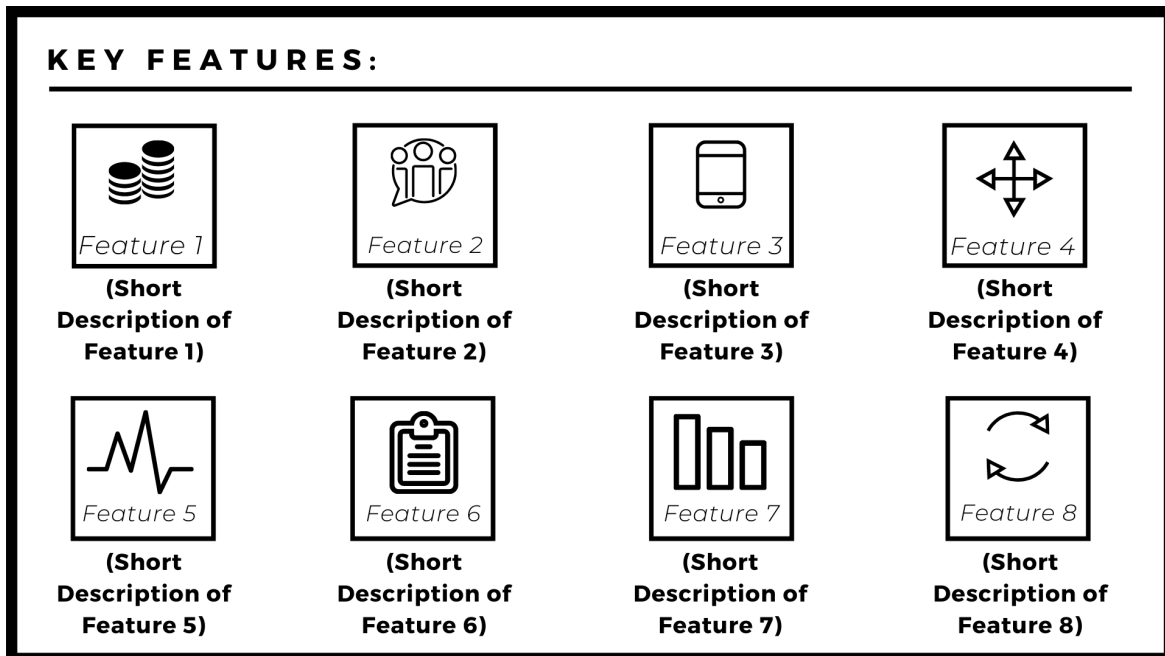
----- is what goes under "presented by".

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## Slide 2: The Features.



Follow the questions on the next pages are to dissect your features for easier understanding. You may not have that many features in the policy to fill up all 8. This will help you understand your own products like the back of your hand.

### Legend:

**Competitive advantage:** *is what make your policy different.*

**Most important feature:** *is what stands out the most.*

**Value added:** *is what comes standard in all policies.*

**Rider/Ancillary:** *is what you can add/take off the policy.*

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Slide 2: The Features.

**Feature 1** - Competitive Advantage #1 In 1 word:

-----

What is your competitive advantage #1 in 4-5 words?

-----

**Feature 2** - Most Important Feature In 1 word:

-----

What is the most important feature of the policy you  
are providing in 4-5 words?

-----

**Feature 3** - Value Added Feature #1 In 1 word:

-----

1 thing that the policy has that comes standard with  
every package you sell in 4-5 words?

-----

**Feature 4** - Value Added Feature #2 In 1 word:

-----

1 thing that the policy has that comes standard with  
every package you sell in 4-5 words?

-----

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## Slide 2: The Features.

### Feature 5 - Rider or Ancillary Feature #1 in 1 word:

-----

1 thing that the policy has that can be removed on every  
package you sell for savings 4-5 words?

-----

### Feature 6 - Rider or Ancillary Feature #2 in 1 word:

-----

1 thing that the policy has that can be removed on every  
package you sell for savings 4-5 words?

-----

### Feature 7 - Rider or Ancillary Feature #3 in 1 word:

-----

1 thing that the policy has that can be removed on every  
package you sell for savings 4-5 words?

-----

### Feature 8 - Competitive Advantage #2 In 1 word:

-----

What is your competitive advantage #2 in 4-5 words?

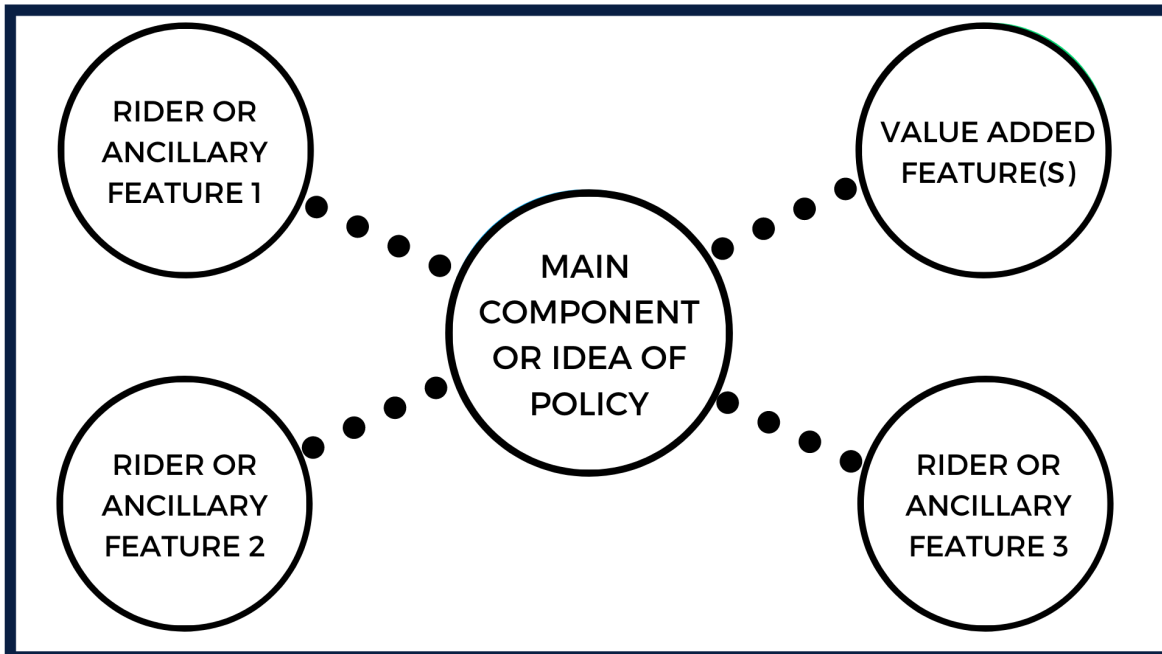
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## Slide 3: The big picture.



Based on the slide 2 exercises, you should be able to fill in each of the segments on the slide using 1-3 words.

### Legend:

**Main component:** is the type of policy you are providing.  
(i.e. - *The technical term of that specific insurance policy*)

Main Component: \_\_\_\_\_

Rider/Ancillary #1: \_\_\_\_\_

Rider/Ancillary #2: \_\_\_\_\_

Rider/Ancillary #3: \_\_\_\_\_

Value Added #1,2 &3 : \_\_\_\_\_

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## Slide 4: The down side.

### **LIMITATIONS OF COVERAGE**

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- Limitation or who this plan is not for #1
- Limitation or who this plan is not for #2  
A small paragraph of how the limitation that is most important works and something the client can refer to and understand even after the presentation.
- Limitation or who this plan is not for #3
- Limitation or who this plan is not for #4

Follow the questions on the next pages are to dissect your limitations to know what type of people you cannot help. You may not know all the answers, but you know someone you can ask for them. By having the questions answered, you should be able to come up with 4-5 limitations. 1 or 2 of the limitations may need a deeper explanation.

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Slide 4: The down side.

What limitations does (the policy) have?

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---

---

Who is this plan not good for and why?

---

---

---

Is there a certain age or group of people that (this policy) does not make sense for?

---

---

---

What kinds of policies would you look at the client and say "keep what you have, you are in good hands and let me know if I can offer you any other service of mine".?

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## Slide 5: Who is this for.

### **THIS PLAN BENEFITS THOSE WHO:**

---

- Group or type of people this plan fits perfectly for #1
- Group or type of people this plan fits perfectly for #2
- Group or type of people this plan fits perfectly for #3
- Group or type of people this plan fits perfectly for #4
- Group or type of people this plan fits perfectly for #5
- Group or type of people this plan fits perfectly for #6
- Group or type of people this plan fits perfectly for #7

Follow the questions on the next pages are to explore your advantages to know what type of people you can help. You may not know all the answers, but you know someone you can ask for them. By having the questions answered, you should be able to come up with 5-7 groups of people you can help. The more specific to a group, the better.

*i.e.- out dated policies, contractors, loosing coverage.*

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Slide 5: Who is this for.

What type or group of people is the policy perfect for? #1

-----

What type or group of people is the policy perfect for? #2

-----

What type or group of people is the policy perfect for? #3

-----

What type or group of people is the policy perfect for? #4

-----

What type or group of people is the policy perfect for? #5

-----

What type or group of people is the policy perfect for? #6

-----

What type or group of people is the policy perfect for? #7

-----

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## Slide 6: The most important feature.

### **(MOST IMPORTANT FEATURE)**

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Fact #1 about most Important feature within policy.

Fact #2 about most Important feature within policy.

\*Disclaimer

Based on slide 2 exercise (feature 2), What is the MIF?

-----

What is a fact about the MIF?

-----  
-----

What is another fact about the MIF?

-----  
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## Slide 7: A graph, chart or table.

### A real chart, graph or table on most Important feature

State	MSA	Provider Counts (see note #1)				Provider Discounts (see note #2)			
		Number of Acute Facilities	Number of Ancillary Facilities	Number of Primary Care Physicians	Number of Specialist Practitioners	Number of Total Practitioners	Effective Discount - Acute Inpatient	Effective Discount - Acute Outpatient	Effective Discount - Ancillary Facility
TN-GA	Chattanooga, TN-GA	12	205	437	1,807	2,158	38.97%	42.93%	46.82%
TN-KY	Clarksville-Hopkinsville, TN-KY	2	66	153	821	932	49.38%	16.26%	48.16%
TN-VA	Johnson City-Kingsport-Bristol, TN-VA	8	206	475	1,402	1,726	43.60%	24.10%	42.29%
TX	Abilene, TX	2	59	145	431	527	21.37%	18.71%	52.19%
TX	Amarillo, TX	3	108	292	841	1,037	39.90%	40.11%	38.45%
TX	Austin-San Marcos, TX	26	615	1,861	5,522	6,734	28.59%	26.73%	67.69%
TX	Beaumont-Port Arthur, TX	11	147	293	780	966	56.01%	35.83%	48.30%
TX	Brazoria, TX	4	68	286	679	867	40.29%	35.63%	48.49%
TX	Brownsville-Harlingen-San Benito, TX	4	75	283	497	668	17.85%	19.14%	50.00%
TX	Bryan-College Station, TX	5	49	322	749	973	63.23%	38.87%	35.27%
TX	Corpus Christi, TX	10	144	326	830	1,049	50.18%	35.25%	44.27%
TX	Dallas, TX	67	1,451	3,751	11,130	13,816	33.72%	32.11%	47.83%
TX	El Paso, TX	11	193	521	1,352	1,874	31.08%	30.10%	53.13%
TX	Fort Worth-Arlington, TX	28	689	1,824	5,072	6,400	31.27%	28.86%	37.83%
TX	Galveston-Ft. Worth City, TX	3	83	401	1,092	1,496	33.72%	26.32%	19.43%
TX	Houston, TX	72	1,544	6,104	15,758	19,312	34.91%	30.27%	59.00%
TX	Killeen-Temple, TX	5	76	463	1,816	2,136	38.81%	23.32%	60.01%
TX	Lubbock, TX	3	57	152	294	402	67.25%	41.49%	41.66%
TX	Lubbock-Marshall, TX	6	88	243	796	957	59.84%	42.75%	35.94%
TX	Lubbock, TX	4	118	303	868	1,048	57.97%	47.97%	48.21%
TX	McAllen-Edinburg-Mission, TX	8	132	501	880	1,224	28.44%	27.23%	31.90%
TX	Non-MSA	144	808	1,964	4,788	6,226	33.40%	24.23%	23.82%
TX	Odessa-Midland, TX	3	88	245	574	734	40.11%	32.90%	28.31%
TX	San Angelo, TX	1	34	67	227	263	52.13%	43.62%	68.23%
TX	San Antonio, TX	36	781	1,921	5,131	6,238	48.58%	32.12%	43.82%
TX	Sherman-Denison, TX	4	79	112	312	386	63.98%	36.12%	32.94%
TX	Vidor, TX	6	136	447	1,226	1,488	50.39%	43.88%	47.39%
TX	Victoria, TX	4	50	157	330	431	57.06%	45.95%	53.07%
TX	Waco, TX	2	82	313	1,056	1,272	45.30%	32.87%	26.51%
TX	Wichita Falls, TX	3	62	141	341	456	7.87%	9.60%	27.76%
TX-AR	Texarkana, TX-Texas, AR	4	65	138	571	660	41.40%	35.41%	42.71%

This is where you do some research and find a chart, graph or table that supports the MIF or the policy as a whole.

This has to be backed by a research company or a credible source, so that the prospect/client knows that there was real research that went into this presentation.

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## Slide 8: Most important feature example.

### **(MOST IMPORTANT FEATURE) EXAMPLE**

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Show the prospect how the most Important feature works by creating a scenario and explain It to them.

You will have to create an example for the prospect/client to understand how this particular benefit works. It will show how a discount works, how the math of the coverage works or how the policy pays out.

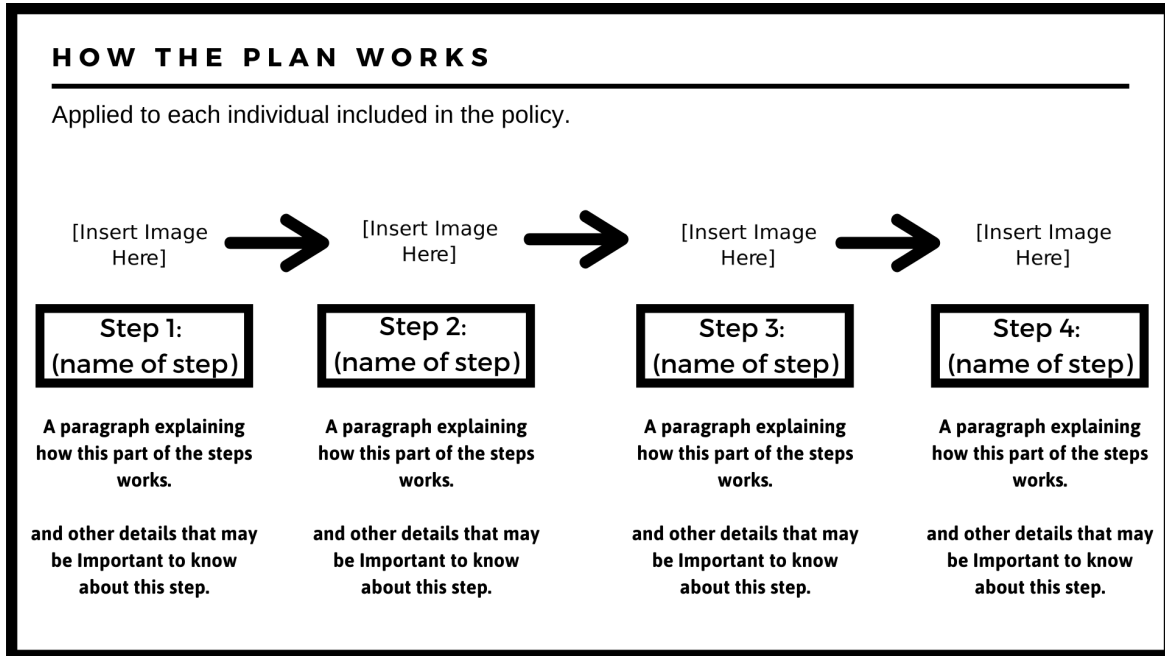
Each policy has Its perks and ways of coverage. Just be sure It is very general, relatable and easy to understand.

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## Slide 9: How the plan works.



This is different than the example because you can now show the process of how to make the example become a reality. You could also show the steps of a particular process your prospect usually ask about. You may not need to use all 4 steps.

Follow the questions on the next page.

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Slide 9: How the plan works.

Step #1 Name: \_\_\_\_\_

Step #1 Explanation

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-----

Step #2 Name: \_\_\_\_\_

Step #2 Explanation

-----  
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Step #3 Name: \_\_\_\_\_

Step #3 Explanation

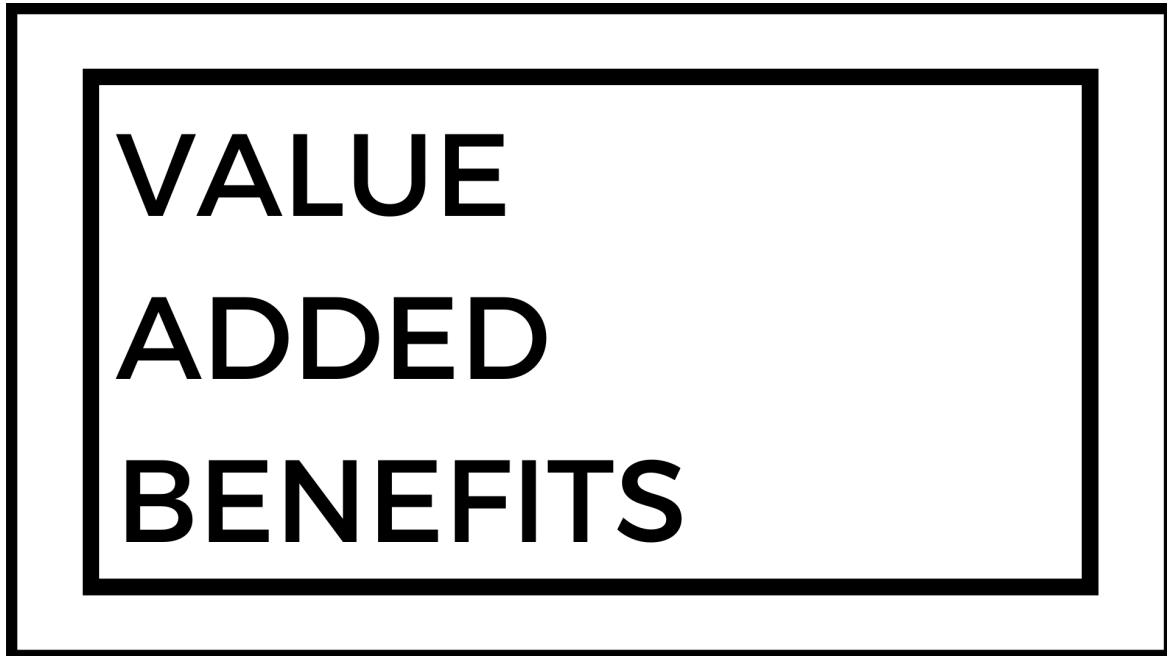
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Step #4 Name: \_\_\_\_\_

Step #4 Explanation

-----  
-----

Slide 10: Value added benefits title.



This is just a title page about to introduce the value added benefits of the policy. This will help break up the presentation and shows the prospect what is coming up next in the next couple slides.

It will help you present the ancillary products coming up as value added benefits, so the need to having them grows.

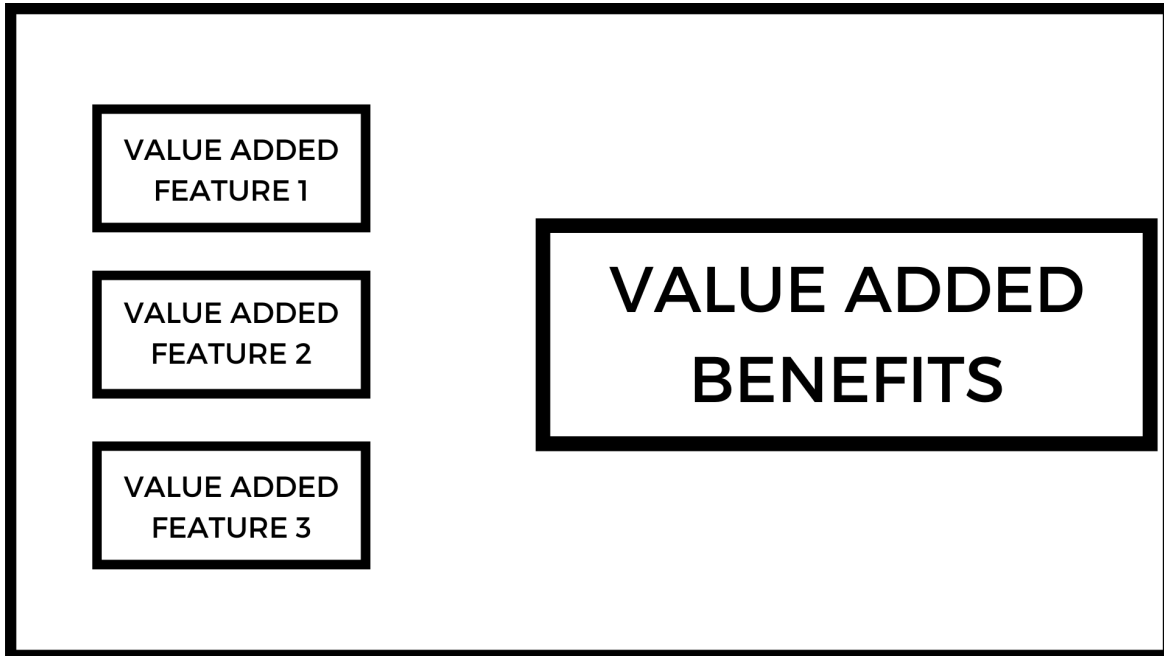


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Slide 11: Value added benefits.



Value Added Feature #1: \_\_\_\_\_

Value Added Feature #2: \_\_\_\_\_

Value Added Feature#3: \_\_\_\_\_

## Slide 12: The Up-sell.

**(up-sell policy name or type)**

**Explanation of the policy  
you would like to offer in  
addition.**

\*Additional Cost

(link to see benefits)

All insurance brokers should have access to other multiple policies they can sell alongside with their current proposal. The probability of them getting may be slim, but It takes away from the redundancy of your presentation, offers a better coverage & increases the chances of closing.

Name of Policy or Type: -----

Explanation:

-----  
-----

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## Slide 13: The riders or ancillaries.

### **RIDER OR ANCILLARY FEATURE # 2**

A paragraph description on how the rider or ancillary product works or how it covers the client once an incident takes place.

[Insert image or illustration here]

### **Fact #1 about Why it is Important to have this Rider or Ancillary Feature**

You can now start talking about the riders or ancillary features that make the policy more robust for the client. You may not need Fact #2.

Rider/Ancillary #1: \_\_\_\_\_

Explanation:

\_\_\_\_\_  
\_\_\_\_\_

Fact #1: \_\_\_\_\_

Fact#2: \_\_\_\_\_

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Slide 14: The riders or ancillaries.

## **RIDER OR ANCILLARY FEATURE # 2**

A paragraph description on how the rider or ancillary product works or how it covers the client once an incident takes place.

[Insert image or illustration here]

**Fact #1 about Why it is Important to have this Rider or Ancillary Feature**

You can now start talking about the riders or ancillary features that make the policy more robust for the client. You may not need Fact #2.

Rider/Ancillary #2: \_\_\_\_\_

Explanation:

\_\_\_\_\_  
\_\_\_\_\_

Fact #1: \_\_\_\_\_

Fact#2: \_\_\_\_\_

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Slide 15: The riders or ancillaries.

<p><b>RIDER OR ANCILLARY FEATURE #3</b></p> <p>A paragraph description on how the rider or ancillary product works or how it covers the client once an incident takes place.</p> <p>[Insert image or illustration here]</p>
<p><b>FACT #1 ABOUT WHY IT IS IMPORTANT TO HAVE THIS RIDER OR ANCILLARY FEATURE</b></p>

You can now start talking about the riders or ancillary features that make the policy more robust for the client. You may not need Fact #2.

Rider/Ancillary #3: \_\_\_\_\_

Explanation:

-----

-----

Fact #1: \_\_\_\_\_

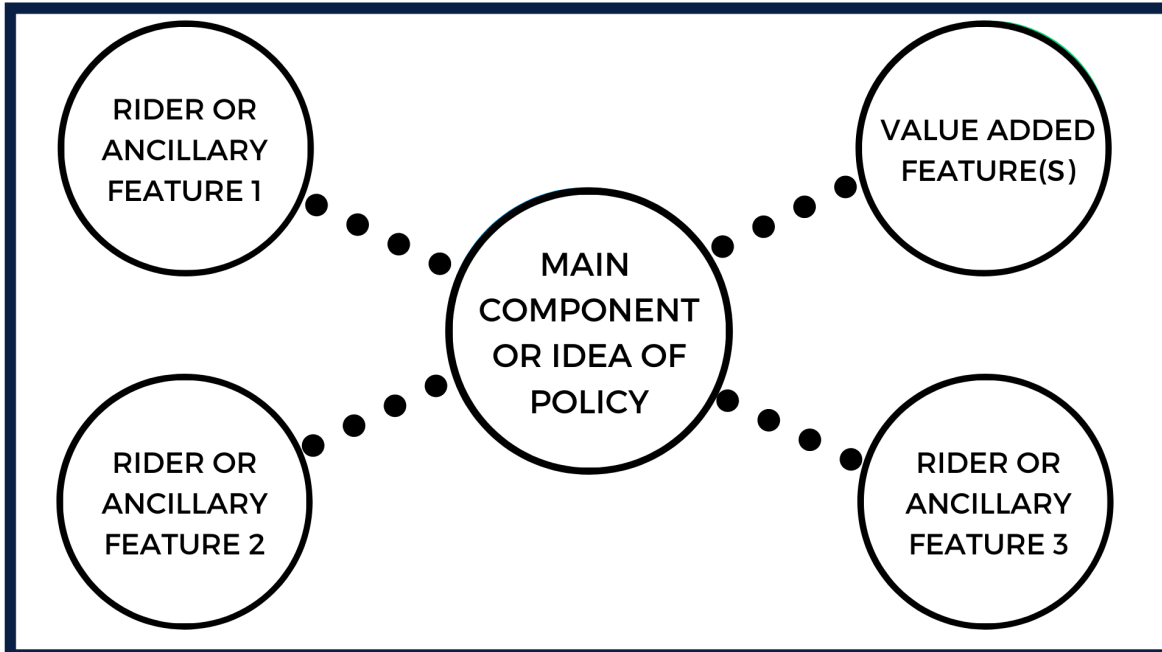
Fact#2: \_\_\_\_\_

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## Slide 16: The big picture.



We now repeat the side 2, so the client understands what all was covered in a simple illustration.

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## Slide 17: The Disclaimer

(Your Name Or Company Name)  
[Email - Phone]

### Disclaimer

(A PARAGRAPH DESCRIPTION ON YOUR DISCLAIMER. YOU CAN USE A COMPANY MADE ONE OR YOUR OWN TO EXPLAIN THAT THIS POLICY HAS A POSSIBILITY OF DENYING OR NOT FULLY COVERING A CLIENT DUE TO XYZ REASONS. MENTION THAT THIS POLICY IS NOT FOR EVERYONE AND THAT APPLICATION IS NECESSARY. THIS IS THE PERFECT OPPORTUNITY TO CREATE A "TAKE AWAY")

This part of the presentation is crucial to selling more more policies and staying within legal boundaries as a licensed broker. The disclaimer can be warnings your policy has or letting the client know that you are not the Insurance company, that there is a chance of denial.

Your Name/Company: \_\_\_\_\_

Contact Email and/or Phone: \_\_\_\_\_

Disclaimer:

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an awesome presentation on your platform of choice.

*If you have not finished reading the book Agent to Agency,  
I highly recommend doing so. It will give you more tips and ticks to  
use that allow you to grown a great organization.*

- Leo Bados Jr.