

Combination Products

Company & Distributor Strategies to Integrate Combo Products Into Daily Activity

Moderated By:

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16th Annual Intercompany Long Term Care Insurance Conference

Integration Strategies Session Overview



- Welcome and brief overview
- Session format
- Session goals
- Panelist introductions
 - *Dave Lane, Nationwide*
 - *Mike Skiens, Master Care Solutions*
 - *Kevin Fisher, OneAmerica*
 - *Mark Goldberg, FPS Insurance Agency*

Featured Panelists



- **Dave Lane, CLU, CLTC**
 - *Regional Vice President, Nationwide*
- **Mike Skiens**
 - *President, MasterCare Solutions*
- **Kevin Fisher**
 - *Regional Marketing Director, OneAmerica*
- **Mark Goldberg**
 - *President, NorthStar Network Ins. Agency*



- What thinking precedes your decision whether to add a product/distributor?
- What key factors help you decide whether to add a product/distributor, particularly as it relates to combo products?
- What due diligence do you perform in deciding whether to bring on a new combo product or agency?



- What specific steps or considerations impact the successful implementation of a new product?
- What have you seen work well, or go wrong, when bringing on a new combo product or distributor?

Training For A New Combo Product



- What methods do you utilize for training staff? Producers?
- What role in training do you expect from the carrier/distributor?
- What have you seen work well when training people on a new combo product?
- What is ineffective or should be avoided when training for a new product?



- What obstacles exist with producers in selling combo products?
- What specific steps does your company take to get producers selling combos?
- What tools/incentives do you utilize to promote combo products?
- What are 'must haves' to successfully support combo product sales?
- What will cause a new product implementation to fail, short or long term?



In your opinion, what is the number one factor necessary to ensure success in selling combo products?



QUESTIONS AND ANSWERS



THANK YOU!!