



# The Manager's Workshop

Identifying the challenges and solutions of incorporating LTC into your agency's or firm's culture

THE ELEVENTH ANNUAL INTERCOMPANY LONG TERM CARE INSURANCE CONFERENCE

# ILTCl



# Common Issues Facing Life Agencies & Investment Firms

- Positioning LTCi into the agency scheme for sales
- Developing realistic goals
- Allocation for management & agent training
- Managing LTC activity with prospects



# Common Obstacles

- Lack of agent confidence and competence
- Limited new agent orientation
- Limited live training: inconvenience
- Managing the completion of NAIC Partnership Training certification



# The Workshop Formation

1. Separate into tables
  - A. Life agencies
  - B. Investment firms
2. Elect captain of the table
  - A. Manage the exercise
  - B. Report results to the entire group



# Questions For The Groups

- 1. How does LTC insurance fit into your agency?**
- 2. How does LTC training integrate with your overall training?**

How do you make agents comfortable mentioning LTC and making the sale?

How do you reinforce basic training?

- 3. How do you INTERNALLY market for LTCI within the agency?**

How do you make it easier for the agent to go out and make a sale.

Are you creating a plan, executing it and managing for results

- 4. How do you EXTERNALLY market for LTCI to outside consumers?**

- 5. How do you recruit using LTC?**