

SDI 1 ADAPTING in a Digital Environment



**ADAPTING
in a Digital
Environment**
(Digitally -
Enabled)

An overview of
the digital
revolution and
the benefits for
advisors who
are digitally-
enabled and
develop a
business plan

Episode 1.1

Digital Acceleration

Episode overview: The 4th Industrial revolution is merging technology with humans. Although still in the early stages of transforming society, profound and fundamental changes are underway. This episode demonstrates how the digital acceleration of key trends is transforming society and insurance while discussing the impact on Advisors and why they must adapt in this increasingly digital world.

Episode 1.2

Consumer Behaviour

Episode overview: Consumer Behaviour has changed and become a driving force in insurance industry transformation. Advisors must understand the key trends, the consumer profile, and the CX expectations in this new digital sales journey. This episode explores the key trends in Consumer Behaviour and explain the portrait of the insurance consumer, their needs, and expectations for the digital sales journey.

Episode 1.3

Digital Advisors

Episode overview: The insurance industry is rapidly moving away from the traditional advisor model and the OMNI Advisor of the future will be both digitally-enabled and digitally-present. This episode explains the digital transformation of the traditional insurance Advisor and define the new advisor model while exploring some of the new tools and opportunities for advisors who are willing and able to adapt.

Episode 1.4

Digital Strategy

Episode overview: Businesses and Advisors are developing digital strategies that align with the changing consumer journey to remain competitive. Digital advisors must adopt these strategies at every step of the sales cycle to expand their social reach and generate leads. This episode explains the importance of a digital strategy and provide insights into corporate strategies and the practical aspects of an advisor's personalized digital strategy.

Episode 1.5 The S1 DSP Adapting to capture the opportunity with the design of a basic strategy

Planning Overview: The Digital Sales Planner is designed in a traditional format that focuses on the key areas of digital engagement to capture the opportunity. The DSP does not replace the existing planning process, but supports and provides a digital layer of planning detail. The design of a basic plan starts with a purpose to understand the "Why" before developing the "What" and "When".

SDI 2 DEVELOPING a Digital Sales Presence



SDI 2 DEVELOPING



DEVELOPING a Digital Sales Presence (Digitally - Present)

A guide to
developing a
digital sales
presence in
target consumer
groups by using
available digital
tools and
resources

Episode 2.1

Digital Identity

Episode overview: Advisors with a unique digital identity create visibility and additional opportunity to professionally engage with prospects and customers. This episode explains the important steps in establishing a digital identity as a professional insurance advisor while identifying methods to develop, enhance, and sustain a digital identity that allows the advisor to compete and thrive in the digital world..

Episode 2.2

Target Consumers

Episode overview: The most successful Advisors position themselves within a target market using effective digital methods to reach consumers. This episode explains the advantages of working in a target consumer group while providing a process for identifying target consumers and a few key digital methods for working effectively in that market to generate more leads and satisfied consumers.

Episode 2.3

Effective Content

Episode overview: Reaching a target consumer group with the right content will generate more responses and potential leads. All content is not created equal as some content does well on social media and other content does not. This episode explains the types of content and the characteristics of compelling content while learning to select content that does well within certain consumer groups.

Episode 2.4

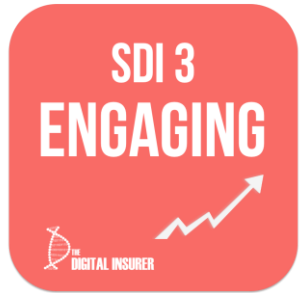
Influencers & Testimonials

Episode overview: The use of Influencers and Testimonials is a powerful business strategy and these business development methods share one thing in common – trusted promotion of your business. This episode compares the features of these development strategies and discuss the basics of recruiting Influencers and obtaining Testimonials.

Episode 2.5 The S2 DSP Developing a digital identity with content to reach target consumers

Planning Overview: The importance of a professional image within a target group of consumers cannot be underestimated. The S2 Planning Episode focuses on developing a unique digital identity, target consumers, and selecting effective content with the use of Influencers and Testimonials to establish a digital presence..

SDI 3 ENGAGING through Social Media



ENGAGING
through
Social Media
(Digitally -
Active)

Proven
methods to
identify
prospects,
generate leads,
& effectively
engage with
clients on
social
platforms

Episode 3.1

Paid, Dark, & Live

Episode overview: Promoting your business on social media is a digital advisor skill to be mastered and understanding some of the basic marketing methods is important. This episode explains the difference between Paid, Dark, and Live marketing while comparing the advantages of each method to determine the best approach to grow your business.

Episode 3.2

Social Platforms Part 1

Episode overview: Social media dominates our daily routine and offers tremendous opportunities for the digital insurance advisor and understanding some of the most popular social platforms is important. This episode demonstrates the power of social media platforms to market your business while discussing the basic platform engagement strategies and identifying which consumer groups are active on Facebook, LinkedIn, and Instagram.

Episode 3.3

Social Platforms Part 2

Episode overview: Social media dominates our daily routine and offers tremendous opportunities for the digital insurance advisor and understanding some of the most popular social platforms is important. This episode demonstrates the power of social media platforms to market your business while discussing the basic platform engagement strategies and identifying which consumer groups are active on WhatsApp, TikTok, and YouTube.

Episode 3.4

Views, Likes, & Shares

Episode overview: Digital technology allows ordinary thoughts, ideas, and content to be shared instantly with large numbers of people and understanding the difference between Views, Likes, & Shares is an important skill. This episode compares the different levels of response to digital content while exploring opportunities to increase views, likes, and shares and methods to track digital sales activity.

Episode 3.5 The S3 DSP Engaging with prospects and clients through social media

Planning Overview: Creating a core Social Media Plan through the design of a comprehensive strategy to capture the remarkable opportunities of social media is important. This planning episode focuses on the different social media marketing methods and most popular social platforms available to engage with consumers with a strategy to increase Views, Likes, & Shares..

SDI 4 THRIVING in a Virtual World



Season 4
THRIVING
in a Virtual
World
(Digitally -
Skilled)

A focus on
virtual sales
communication
and
presentation
skills that result
in satisfied
clients and
improved
performance

Episode 4.1 Working Virtually

Episode overview: Working virtually with digital tools will enhance the sales process while improving consumer service, and satisfied customers, productive Advisors, and profitable insurance companies produce more of the same while driving an increase in performance. This episode explores the finer points of working virtually with consumers to improve advisory and performance while discussing Privacy and Regulations in a digital world.

Episode 4.2 Approaching Leads

Episode overview: Establishing a digital presence on social media will provide many digital leads and converting a lead into an appointment is the primary goal of a successful approach. This episode explains effective ways to convert leads into appointments through the use of effective scripting while providing examples of successful sales approaches.

Episode 4.3 Prioritising Needs

Episode overview: Prioritising Needs through a collaborative discovery process is a proven method for helping customers discover needs and make buying decisions. As a digital insurance professional, mastery of the Discovery process using digital tools is a beneficial skill. This episode explores the foundations of needs-based selling and the benefits of collaborative discovery while discussing effective need prioritization the use of effective scripting.

Episode 4.4 Presenting Solutions

Episode overview: Presenting the Solution and Closing is the most natural step in the sales process if a vital need has been discovered through collaborative fact-finding. As a digital insurance advisor, presenting the solution in a professional way is crucial. This episode explains effective ways of presenting solutions while demonstrating examples of gaining commitment through the use of effective scripting.

Episode 4.5 The S4 DSP Thriving in a virtual world with skills to improve performance

Planning Overview: The final Digital Sales planning episode focuses on the design of engagement scripts to improve sales advisory services in a virtual world by developing knowledge and skills within the sales process. An opportunity to develop personal in converting digital leads to appointments, prioritising needs, and presenting solutions are part of this planning segment.

SDI 5 LEADING a Digital Sales Team



LEADING a Digital Sales Team (Digitally Leading)

An overview of the key factors involved in successfully leading & managing a digitally-enabled sales team with a comprehensive business strategy

Episode 5.1

Leading & Managing

Episode overview: The digital world is and transforming the fundamentals of leading and managing through the merging technology with humans and new methods are emerging for Leaders and Managers. This episode explores the differences and similarities of leading and managing while discussing situations where it is necessary to lead and other situations where it is more appropriate to manage.

Episode 5.2

Digital Leaders

Episode overview: Insurance industry leaders are moving away from the traditional leader model and becoming OMNI leaders that are both digitally-enabled and digitally-present. This episode observes the digital transformation of the insurance leader and defines a new leader model positioned to lead a team of OMNI Advisors while exploring some of the new tools and opportunities for leaders who are willing and able to adapt.

Episode 5.3

Promoting Standards

Episode overview: An effective tool in the leader's arsenal is establishing and promoting standards. With digital transformation greatly impacting the insurance industry, new standards for performance are emerging in the digital sales journey. This episode discovers the importance of promoting standards as a leader or manager and identifies the important areas of performance that require established standards.

Episode 5.4

Team Dynamics

Episode overview: Modern digital sales teams are organized and operate in a new digital world. Working and selling virtually requires new methods and strategies to perform effectively and digital team leaders must adapt to remain competitive. This episode identifies the key areas and dynamics of digitally-enabled sales teams and explains several important areas in the development of a digital sales team strategy.

Episode 5.5 The S5 DLP

Leading a sales team in today's digital world with a business plan

Planning Overview: The Digital Leader Planner is designed in a traditional format that focuses on the key areas of leading a sales team in today's digital world. The DLP does not replace an existing planning process, but rather provides a digital layer of planning detail. This Planning Episode shows how the design of a basic plan starts with understanding the team Mission/Vision and the other important targets for team size and productivity.

SDI 6 RECRUITING Digital Advisors



RECRUITING Digital Advisors (Digitally Recruiting)

A digital guide to recruiting target advisors through developing a digital presence, using compelling content, and following a digitalised recruiting process

Episode 6.1 Digital Recruiting

Episode overview: Recruiting advisors is a new and developing opportunity in the digital world. From changes in the ideal candidate profile to methods of prospecting and interviewing prospective advisors online, the recruiting process has become increasingly digitised. This episode explains how digital can leverage key areas of advisor recruiting while discussing opportunities to implement systematic digital advisor recruiting.

Episode 6.2 Target Advisors

Episode overview: The recruiting process starts with the identification of the ideal profile of an advisor candidate. With digital transformation greatly impacting the insurance industry, a new advisor profile and standards for performance are emerging in the digital recruiting journey. This episode defines the ideal profile of an advisor candidate while exploring place to engage with prospects and discussing digital recruiting best practices.

Episode 6.3 Recruiting Content

Episode overview: Reaching a target advisor group with the right content will generate more responses and potential leads. Certain content will resonate with prospective advisors and other content may not. This episode explores the types of content and the characteristics of compelling content while showing how to develop and select content that will reach the candidates with the preferred profile..

Episode 6.4 A Digitised Process

Episode overview: The recruiting process has changed and digital innovation is driving a digitisation of the traditional recruiting. From candidate attraction and selection to interviewing and hiring, innovation is driving a new digitised recruiting process. This episode identifies the key steps in recruiting while discussing some of the key aspects and best practices of implementing a digitised recruiting process.

Episode 6.5 The S6 DLP Recruiting advisors with a digital presence, compelling content, and a digitalised process

Planning Overview: In Season 6, the Digital Leader Planner focuses on the key areas of recruiting digital advisors. The DLP does not replace the existing planning process, but supports and provides a digital layer of planning detail. This Planning Episode shows how the design of a basic plan starts with identifying an ideal advisor candidate profile and benefits from the use of compelling recruiting content and a digitised recruiting process.

SDI 7 TRAINING through Digital Media



TRAINING through Digital Media (Digitally Training)

A review of proven methods to digitally train & develop advisors using online programmes, Regular Reviews, Joint Work, and Group Training

Episode 7.1 Digital Training

Episode overview: Training and developing advisors in the new digital world offers improved opportunities. From changes in the accessibility of online learning to the use of virtual technology, the training process has become increasingly digitised. This episode explains how digital has impacted the key areas of advisor training while discussing opportunities to implement consistent digital advisor training.

Episode 7.2 Regular Reviews

Episode overview: The regular performance review is one of the most effective advisor development tools. Through implementation of a formal process, a leader can uncover performance deficiencies and provide remedial activities. This episode explains the importance of conducting regular reviews and the advantages of analysing performance while identifying a process and some of the key areas to regularly review.

Episode 7.3 Joint Work

Episode overview: Many leaders/mentors would agree that Joint Work is one of the most satisfying and effective methods of advisor development, and understanding the different digital approaches to Joint Work with advisors will provide lasting benefits for the leader and their team. This episode explores the opportunities of Joint Work and the advantage of working with a leader or mentor while discussing some key areas for conducting Joint Work.

Episode 7.4 Group Training

Episode overview: Group Training offers many advantages from efficiency in delivery to participant synergies, Group Training is one of the most implemented forms of advisor development. Through digital innovation, Group Training provides a digital leader with enhanced benefits when developing a team of advisors. This episode defines the opportunities of Group Training while identifying the process and a few key areas to conduct Group Training.

Episode 7.5 The S7 DLP Training with proven digital methods to develop self-reliant and productive producers

Planning Overview: In Season 7, the Digital Leader Planner focuses on the key areas of training digital advisors. The DLP does not replace the existing planning process, but supports and provides a digital layer of planning detail. This Planning Episode shows how the design of a basic plan starts with identifying an overall training plan and benefits from conducting Regular Reviews, Joint Work, and Group Training.

SDI 8 COACHING for Digital Performance



COACHING for Digital Performance (Digitally Coaching)

A study of the key principles of virtual Coaching that ultimately results in enhanced client engagement and improved advisor performance

Episode 8.1

Virtual Coaching

Episode overview: Coaching in the virtual world offers many opportunities for both the advisor and the leader/mentor. In addition, coaching is even more impactful when it focuses on enhanced client engagement and improved performance. This episode defines the benefits of coaching in a virtual world while reviewing coaching basics and discussing coaching advisors at different levels of competency.

Episode 8.2

Analysing Performance

Episode overview: For many years, personal performance in the insurance industry has been based on mastering Knowledge – Attitude – Skills – Habits (KASH). In the digital age, understanding the new factors within KASH are an important coaching skill. This episode explains the importance of analysing performance and methods for review/analysis while identifying key areas of developmental trainings.

Episode 8.3

Constructive Feedback

Episode overview: Providing constructive feedback is a very beneficial development tool. When implemented properly, the implementation of feedback can enhance client engagement and improve performance. This episode defines the benefits of providing constructive feedback while exploring some of the digital methods and key sales situations that can be improved through feedback.

Episode 8.4

Imagining Outcomes

Episode overview: The achievement of performance goals is often related to the setting of personal goals and visioning. Ultimately team success is based on the individual achievement of personal goals and by committing to clear targets with a view of what achievement looks like, a goal can be more easily attained. This episode explores the benefits of setting goals and visioning achievement while discussing the impact of personal motivation.

Episode 8.5 The S8 DLP

Coaching in a virtual world to enhance client engagement and improve performance

Planning Overview: In Season 8, the Digital Leader Planner focuses on the key areas of coaching digital advisors. The DLP does not replace the existing planning process, but supports and provides a digital layer of planning detail. This Planning Episode shows how the design of a basic plan starts with identifying an overall coaching plan and benefits from conducting coaching, providing feedback, and developmental training.