

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".