



# THE ART

OF SELLING PERSONAL PROTECTION



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THE BEST WAY  
TO PREDICT THE  
FUTURE IS TO  
CREATE IT

- PETER DRUCKER

# FIND OUT WHY THIS COURSE IS A GAME CHANGER

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Selling personal protection insurance is a rewarding career. But there are challenges to be met on the way. By investing in your advisers' self-development, mindset and business skills, you're also investing in the integrity and future-proofing of your business as whole.

You want your advisers to understand the products but also, to build trust with clients and customise solutions to meet their needs. Armed with the techniques to achieve this, they can effectively help individuals and families protect their financial futures.

Your advisers' successes needs to be measured not only by the number of policies they sell, but also, by their ability to control their own anxieties and stress-levels, enjoy their work more, build long-term relationships, create referrals and develop their skills to positively impact their clients' lives.

Created by protection advisers for protection advisers, this unique and easy-to-watch 80 minute e-learning course teaches the Art of Selling Personal Protection. It's packed with useful tools, tips and techniques advisers can practise and implement for immediate results.

This course has been CPD accredited by the CPD Certification Service, the world's leading and largest CPD accreditation organisation across all industries.

# RESULTS YOU WILL ACHIEVE

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- Improve your mindset and confidence
- 🧠 Improve your knowledge and expertise
- 📊 Improve your customer outcomes
- 🔄 Improve your customer retention rate
- ✓ Increased conversion from call/meeting to customer
- 👤 Significantly increase your referral business
- £ Significantly increase your protection sales
- ⊕ Significantly increase add-on products e.g will, trusts etc
- 🔗 Build a strong introducer network
- 📈 Build a profitable and compliant business



# WHAT YOU WILL LEARN (DAA)



## The Art of Selling Personal Protection – Video Course

Your journey starts here – Relationship Selling

Section 1: Financial security for your clients and their loved ones

Section 4: Identifying your target market and building long-term relationships

Section 7: Sales tips and back office processes for better results

Section 2: Reframe your mindset and up your game

Section 5: Game changing tools and techniques for success

Section 8: Securing long term financial success

Section 3: How to create more referrals and new business

Section 6: Why people buy from you? Powerful story telling

Section 9: Continually improving what you do and how you do it

# WHAT YOU WILL LEARN (DAA)



## The Art of Selling Personal Protection – Video Course

Your journey starts here – Relationship Selling

### Section 1

#### 1. Why buy personal protection?

Financially protect your clients and their loved one's future.

### Section 2

#### 2. Creating a positive mindset

We all experience ups and downs that affect us in many ways.

#### 3. 6 steps to help control negative anxiety

Some quick fixes and steps to get our hands into gear, each time we hit a low and need to bounce back.

#### 4. The circle of confidence

A visual representation how to create a confident mindset.

#### 5. Love what you do with a passion

Focussing on what you love and your good points for business success.

### Section 3

#### 6. Know your client and engage

Following a proven process to start generating referalls.

#### 7. BEROAD – 7 Foundations of business success

Lean into relationship selling to create more new business and referrals.

#### 8. BEROAD-P - Why should you love problems?

Reframe your mindset and thinking, for better results

### Section 4

#### 9. Satisfied clients vs loyal clients

Following a proven process to start generating referrals.

#### 10. Creating connections, introductions and building relationships

How to build a quality business via quality introductions.

### Section 5

#### 11. The three "4s" – Taking massive action

Taking massive action - Goals to aim for to stretch you.

#### 12. Success lives in the land of failure

Finding your niche for long term success.

#### 13. The positive "NO"

Your top 10 objections - Clients don't need to feel pressurised.

#### 14. The three "Cs"

The CPN Referral Methodology - Your proven process to create clients continuously.

### Section 6

#### 15. Telling stories: Buying with emotion and justifying with logic

Understand why clients respond better to story telling.

### Section 7

#### 16. My top tips for selling success

Caring for your clients as an expert adviser.

#### 17. Applications, administration and non-disclosure

Why excellent processes will help your acheive better results.

### Section 8

#### 18. Commission options and the long game

Securing your financial success.

### Section 9

#### 19. Dissatisfaction surveys

An idea to improve what you do and how you do it.

#### 20. CPD and Ongoing training and development

Develop and invest in yourself

# WHAT YOU WILL LEARN (AR)

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Section 8: Continually improving what you do and how you do it

Section 3: How to create more referrals and new business

Section 6: Why people buy from you? Powerful story telling

# WHAT YOU WILL LEARN (AR)



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Course for Appointed Representatives excludes the non-indemnity commission module (part 18)

AR = Appointed Representative



# HOW IT WORKS

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-  All video content is unlocked in stages to assist with your learning
-  Includes a comprehensive workbook to use throughout the course
-  You will receive a test at the start of the process that will be graded, then receive the same test after completing the course to identify knowledge gaps and areas to revisit



# WHAT OTHERS ARE SAYING

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The ideas and concepts revealed in "The Art of Selling Personal Protection" are practical, easy to learn and work so well. As a result our new business has increased significantly and we get many more referrals too. This is a must purchase.

Yonatan Levy - Levy Financial

Our advisers are writing higher levels of quality protection business and regularly use the referral techniques and practical tools Graeme shares. Our team of advisers are more confident in their own abilities with a renewed sense of achievement. The videos are short and to the point, we highly recommend this course.

Neil Wise - Expert Mortgages

# PERFORMANCE INSIGHTS

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## 1 Monitor Performance

The Sales Manager / Director can track which of the team has accessed the courses, therefore showing whom is committed to learn, grow and develop. The manager can monitor how people score in each module and therefore identify which areas they need the most help with.

## 2 Tests

You will receive a test at the start of the process that will be graded, then receive the same test after completing the course to identify knowledge gaps and areas to revisit.

## 3 Workbooks

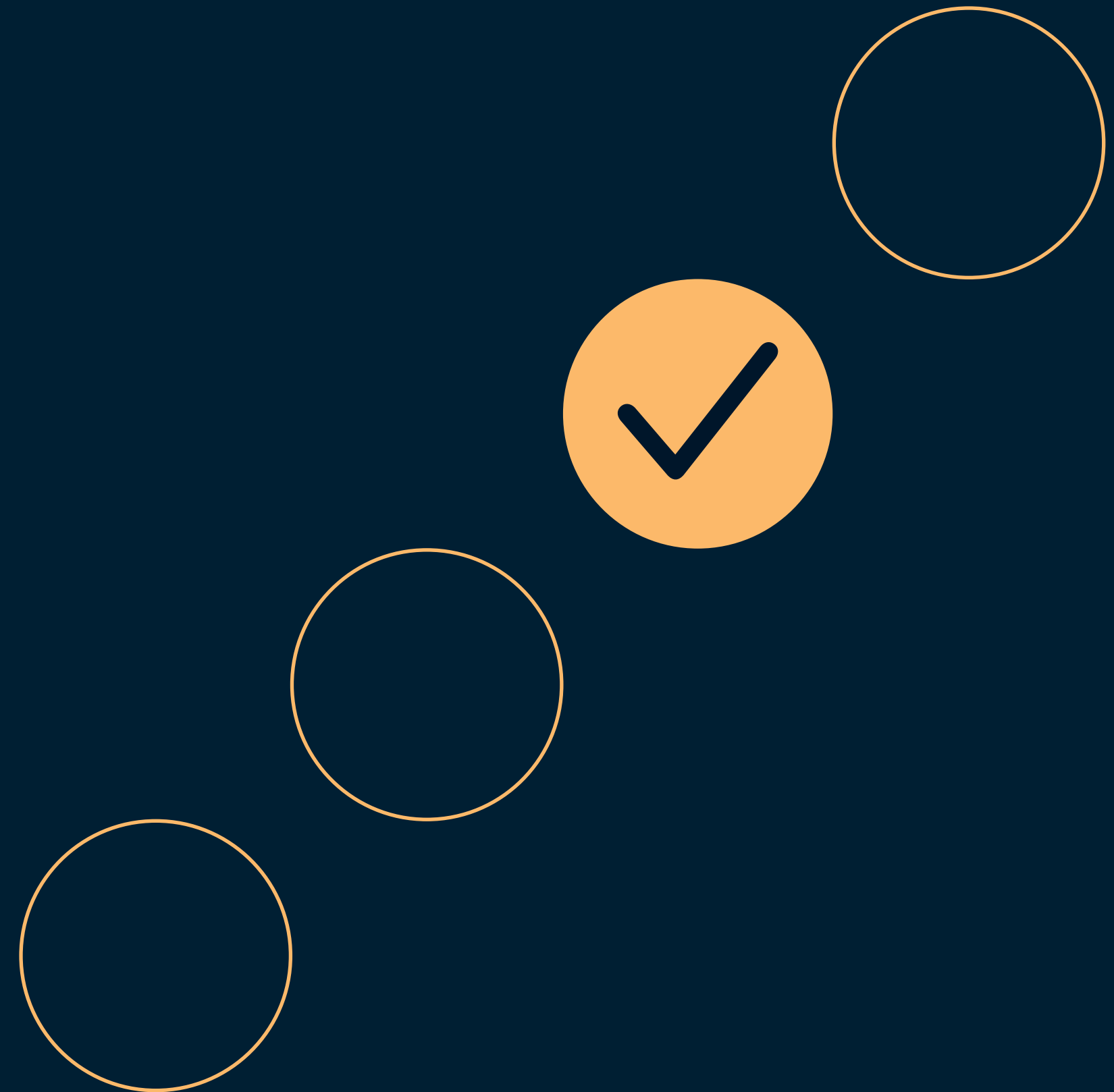
There is a workbook to print out for every module.

# THE ENTRY QUIZ

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- 📊 You will receive a multiple choice test at the start of the process that will be graded. You won't however receive the correct answers.

After completing the course you will receive the same test to identify knowledge gaps and areas to revisit. This time you will have access to the answers after receiving your score.



# MEET THE EXPERT

## GRAEME GODFREY

Graeme Godfrey is a Positive Mindset Coach, Business Adviser, Mentor and Trainer. He enjoyed a successful career in the Financial Services Industry and often talks fondly about his experiences, stories and memories selling insurance spanning almost three decades, eventually selling out in 2015 to his biggest competitor.

Since then, he has coached many entrepreneurs, business owners & founders, CEOs, teams, organisations in many industries, including insurance, media and music, helping them transform their lives and careers to achieve the heights and continued success they are truly capable of achieving.

A 'no-nonsense' guy, Graeme tells it like it is. His communicative, empowering and calm approach inspires so many that are fortunate to work with him. Graeme is often told that he appears in people's lives at exactly the right time. Recently he has focused much of his attention on coaching and mentoring insurance advisers in the protection industry to build highly successful and profitable businesses, using his proven techniques that are effective, powerful, relationship-based and with practice, simple to master.



# YOUR INVESTMENT

All prices are paid annually and include VAT

## Price Per Number of Individual Advisers

NUMBER OF STUDENTS	INVESTMENT PER YEAR
1-2 ADVISERS	£497
UP TO 9 ADVISERS	£1,647
UP TO 29 ADVISERS	£2,497
UP TO 49 ADVISERS	£3,247
50+ ADVISERS	Price On Application

# RETURN ON YOUR INVESTMENT

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1-2 ADVISERS	Write one additional £25 per month, 25 year level term assurance policy will covers the cost of one adviser buying the course.
UP TO 9 ADVISERS	Write one additional £85 per month, 25 year level term assurance policy covers the cost of up to 9 advisers buying the course.
UP TO 29 ADVISERS	Write one additional £125 per month, 25 year level term assurance policy covers the cost of up to 29 advisers buying the course.
UP TO 49 ADVISERS	Write one additional £162 per month, 25 year level term assurance policy will cover the cost of up to 49 advisers buying the course
50+ ADVISERS	TBC



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