

The Risk School courses for 2009/2010 have been designed as a result of feedback from advisers dealing with [the risk store](#) and its services. Our curriculum will always be devised with **adviser feedback and need** as the key drivers. While we will always obtain accreditation for you, for our courses, we are not driven by regulatory requirements and mandated curricula when developing our educational courses. They will always be *practical, translatable to your business and of a quality you will be delighted with.*

Course 4

Sales Success Strategies That Work for Life Risk

The more “selling skills” workshops are run in the industry, the more they are attended. Why? Taking clients on the path to acceptance of recommendations is as much of a relationship and communication exercise as it is a technical one and that has been recognised for a long time when it comes to life risk insurance advising. But these relationship and communication skills are complex and need to be underpinned by professional and robust practice management to be truly effective. This course positions these skills in the context of a well-structured advice and support process. Chris Unwin will present this workshop in conjunction with Sue Laing from [the risk store](#).

Aims

This course will satisfy the demand for practical life risk focused assistance in ‘getting clients over the line’ with the intangible products that make up the life risk suite.

It will deliver:

- Strategies that work for gaining referrals and for maximising review processes for profit: making the most of the client base already in place
- A template for maximizing the effectiveness of strategic alliances
- A structured methodology for making business a natural consequence of the advice process

Learning Objectives

After participating in this workshop, advisers will be able to:

- Plan and execute a referral gathering regime that optimises the outcomes for all parties – client, adviser and referred prospect
- Perform more effective reviews with existing clients
- Work more effectively with professional intermediaries NB Accountants
- Understand the importance of mindset in the advice process
- Engage their clients in a highly structured manner, thereby improving the predictability of business outcomes
- Appreciate the building blocks of closing business
- Explain the value of life risk advice and products to Gen X and Y

CPD Points

TBC – expected 4 to 5 (this may be less from FPA due to the nature of this course)