



PES

Growing Your
Protection
Business

About me...



- + I'm Head of Client Relations at PES
- + I've built and sold two successful protection businesses
- + I started my first business with a £10,000 loan and a single listing in Yellow Pages

The logo for PES, featuring a blue curved line above the letters 'PES' in a bold, sans-serif font.

Happy people. Happy business

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The must haves of a strong protection business

- + A strategic marketing plan – clear prospect identification
- + Lean on insurers – they have a lot of information you can use!
- + Strategic partner plan

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Strategic partners – why bother

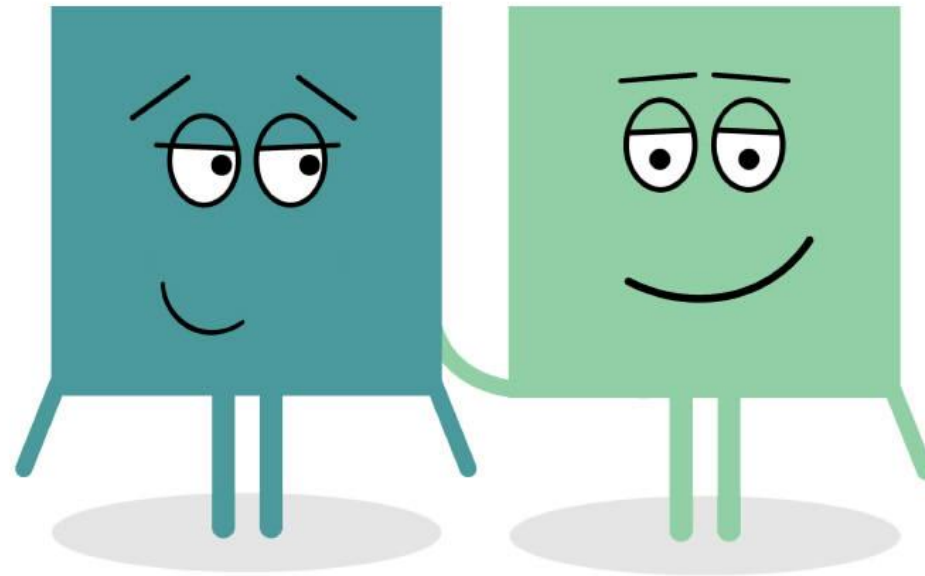


+ Sticky clients

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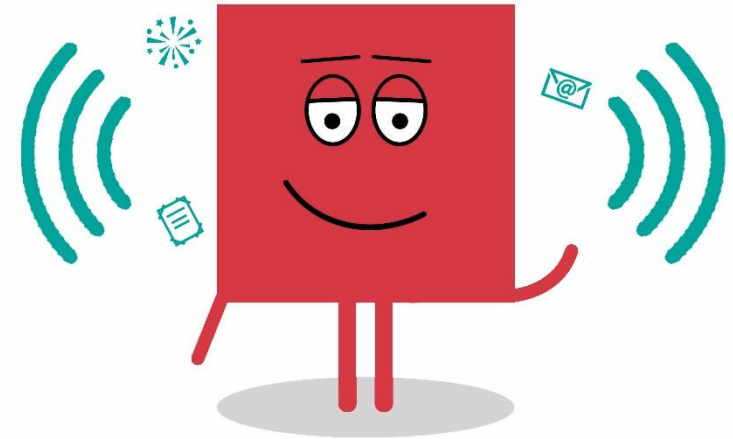
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Strategic partners



Partners can future proof your business

- + Being left behind by technology usage is a threat
- + Clients increasingly communicating protection to employees online
- + Help make clients sticky by offering a tech solution



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The right people

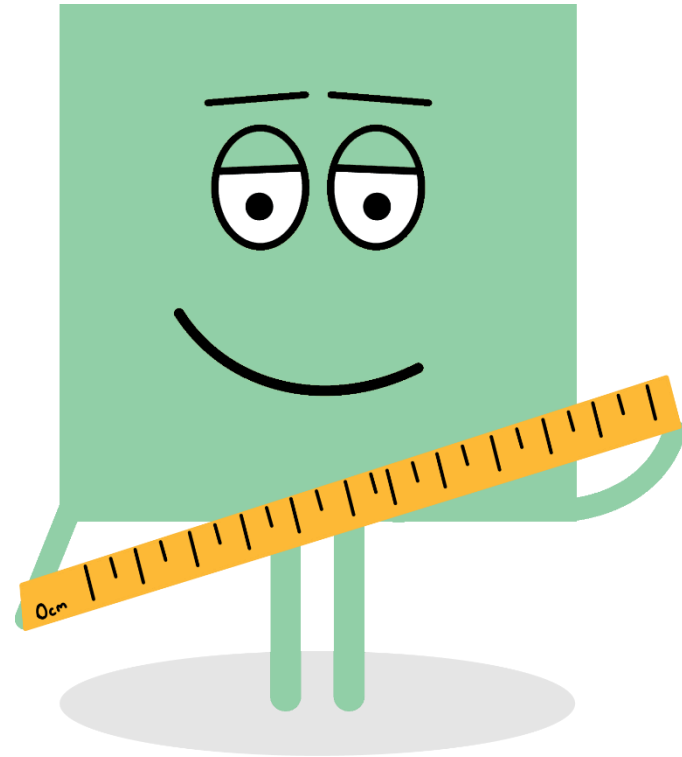


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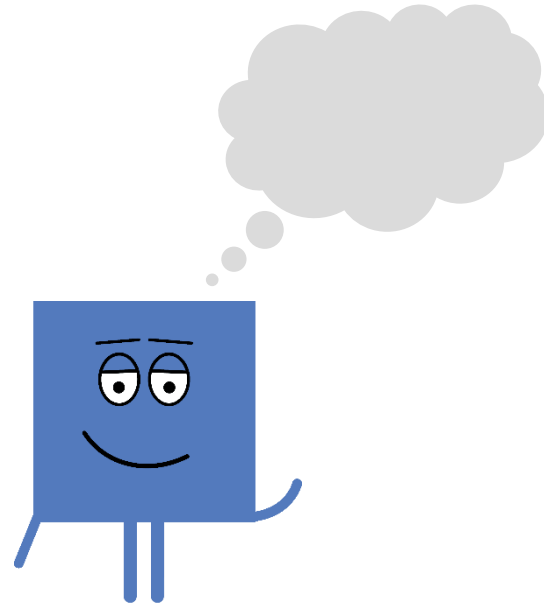
The right people doing the right things

- + Get rid of the noise!
- + Process in place
- + Measure the success



Understanding your customers problems

- + What are my customers challenges?
- + Sell the Grass (not the seed)
- + How does what you do fit into your clients' bigger picture



Wellbeing agenda

- + Wellbeing reports by many insurers
- + Position your proposition in context with their “problem”
- + Understand key wellbeing terms
- + Absenteeism
- + Engagement
- + Retention
- + Know what questions to ask – position yourself as the expert

