



Tactics™

Program

Increase your performance in the sale of insurance products? Yes, it's possible!

Discover and master the strategies of champions.

The IMRA reports that 80% of financial advisors fail over a period of four years. What better way to considerably increase your chances of success than to be trained and coached by champions? This is exactly what the TACTICS™ program offers you.

The program unfolds in two phases:

Discovering the strategies of champions:
With the help of computerized interview simulations, the advisor discovers the deficiencies of his own dialog and the corrective strategies to be applied. He also receives a total of 10 strategies of champions to increase his sales performance, and chooses the strategy he will apply.

Mastering the strategies of champions:
In order to master a champion's strategy, the advisor applies it for one month and shares his experience with a group of colleagues participating in the program. The cycle is repeated for a period of three months.

You will learn how to:

- avoid conversational traps;
- obtain more referrals;
- reduce tension during a dialog;
- increase your interview/telephone call ratio;
- and much more...

Testimonials

(Excerpt from a report by Flavio Sandri on the results of a project pilot at Clarica's Anjou branch)

“Since I've been participating in the TACTICS™ Program, my sales/interview ratio is higher. So is my commission per client.”

Céline Chaput, C.S.F, Clarica

“This program develops sales dialog efficiency – something we have a lot of trouble teaching our advisors.”

Flavio Sandri, Trainer, Clarica

Who is the TACTICS™ Program designed for?

For the financial advisor who wants to increase:

- his income;
- his client volume;
- the quality and quantity of his referrals;
- his efficiency in obtaining appointments by telephone;
- his closing rate.

For the financial advisor who accepts to share his experience of the strategies of champions with a group of colleagues, and who promises to accomplish the tasks required throughout the two phases of the TACTICS™ program.

General Information

- Total cost: \$350/participant
- Duration of program: 3 months
- Meeting place: selected by the group of participants
- Frequency of meetings: one 2-hour meeting per month
- Group of 6 to 10 participants
- Leader: selected by the group of participants
- 15 Professional Development Units (PDU) granted by the Chambre de sécurité financière du Québec