BUSINESS REVIEW CHECKLIST

Transitioning into the new Life Insurance Framework will require considerable thought and potentially, evolution of your business. We've created this handy checklist for you to review your own business, and help clarify your thinking to create an action plan to face into the transition and thrive.

AREA	COMFORT OUT OF 10	ACTIONS
Cash flow pattern change		
Advice/service offering (value proposition)		
Marketing – how we draw clients to us and articulate the value of our services		
Client Engagement technique - the experience our new clients receive when they enquire		
Ongoing client engagement and retention		
Pricing of services		
Right target market?		
Efficiency of administrative processes		
Technology		
Efficiency of advice/compliance processes		
Product solutions		
Education		
Insurer support		