

Wholesale insurance distribution: Eight levers to unlock productivity

For a long time, wholesale insurance distribution didn't change much. This was fine, especially when the insurance and annuities business was growing.

But lately ...

... sales have flattened ...



and

... profitability is under pressure ...



Why? Because distribution approaches are stuck in a traditional mode.

Financial advisers now want:

- To engage **across channels**, not just in person.
- Guidance in providing **holistic solutions**, not a product sale.
- Help managing their practice and **acquiring new clients**.



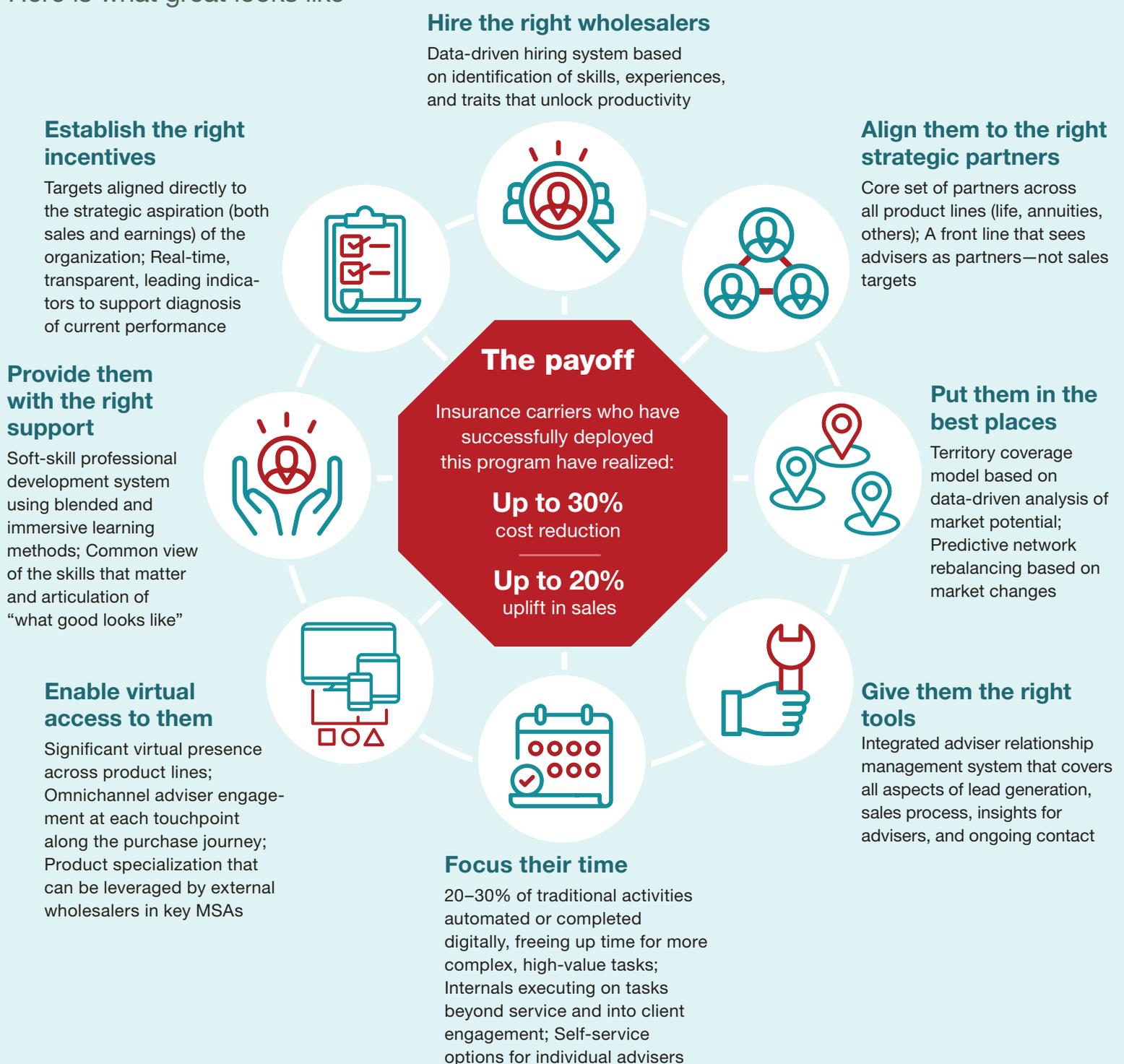
The good news:

- Technology can **automate up to 30%** of traditional wholesaler activities.
- New CRM systems can **optimize adviser outreach**.
- Mobile and self-service capabilities significantly **improve experience and efficiency**.

But where to start?

Leading distribution organizations are deploying eight levers to drive significant increases in productivity from their wholesalers.

Here is what great looks like



So what's holding you back?

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