

● 3 CPD Hours

## Unlocking Sales Success with Customer Data

[Register Here](#)

**Mode: Face-to-Face Training**

**Date: 12 December 2024**

**Time: 9.00 a.m. to 12.00 p.m.**

### Programme Highlights

As the insurance landscape evolves, traditional lead generation methods like cold calls, roadshows, and telemarketing are becoming increasingly challenging. In this competitive environment, insurance intermediaries must adopt innovative approaches that deliver measurable results. One of the most effective strategies is harnessing existing customer data to unlock new sales opportunities and build stronger client relationships.

This workshop explores how insurance intermediaries and marketing staff can strategically use existing customer data to enhance lead conversion, foster personalised engagement, and drive higher sales success rates. By deeply understanding customer needs and preferences, financial advisers can tailor their approach, positioning themselves as trusted advisers while improving conversion rates.

### For Whom

- Insurance agents, brokers and financial advisors handling life and health insurance.
- Also suitable for life and health insurance marketing staff.

### Key Learning Objectives

At the end of the programme, participants should be able to:

- Gain actionable insights into leveraging customer data, enabling them to close more sales.
- Adopt personalised engagement strategies, strengthening client relationships and encouraging repeat business.
- Identify and act on upselling and cross-selling opportunities within their existing client base.
- Understand how to use customer data effectively, empowering them to set and achieve sales goals with confidence.

## Programme Outline

### 1. The Power of Customer Data for Sales Success

- Set the stage by emphasising the importance of a strong year push.
- Introduce the transformative potential of customer data in boosting sales effectiveness.

### 2. Personalised Customer Engagement

- Illustrate how leveraging customer data to personalise interactions can enhance client trust.
- Increase the likelihood of closing sales, making engagements more impactful and tailored.

### 3. Proactive Client Retention Strategies

- Discuss techniques for maintaining client loyalty and engagement.
- Highlight proactive approaches that ensure clients feel valued and are more likely to pursue repeat business.

### 4. Data-Driven Upselling and Cross-Selling

- Explore actionable strategies to identify upselling and cross-selling opportunities within an existing client base.
- Use customer data insights to guide timing and product selection.

### 5. Call to Action & Closing

- Wrap up with a compelling call to action that encourages financial advisers to implement these data-driven techniques immediately.
- Reinforce the message that consistent application will position them for year-end success and long-term growth.

## Programme Leader



**Kim Yan Lim** is an accomplished Life and Health Insurance professional with over 15 years of experience in strategic partnerships, regional distribution management, and business transformation across Southeast Asia. Known for strong business acumen and expertise in the insurance value chain, Kim has successfully driven growth through collaborative partnerships with key stakeholders, including high-net-worth Financial Advisory firms and brokers. As the founder of Kim Global Consultancy, Kim delivers presentations and workshops to empower organizations in data-driven sales success. With a track record of leadership roles at Verisk, Zurich Life Insurance, and Aon Hewitt, Kim has consistently excelled in client engagement, cross-functional team leadership, and thought leadership in insurance.

## Programme Fee

Full Course Fee: S\$218.00 (incl. of 9% GST)

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## SINGAPORE COLLEGE OF INSURANCE

PEI Registration No: 199408491M

Period Of PEI Registration: 26-09-2023 to 25-09-2027

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