Legal & General

Learn the secrets of protection success from advisers

Our latest research, *The Secrets of Protection Success*, shares the winning formula used by some of the industry's top protection advisers, designed to help you achieve better outcomes.

Lewis Gwen
B2B Marketing Campaign Manager

If you've ever felt that selling protection is difficult because you feel you either lack knowledge, uncertain of your client's objections, or it feels too specialist, our research shows how you can do things differently.

The Secrets of Protection Success reveals top adviser techniques and lays the foundations for those who want to enhance their skills when selling protection.

What the research involved

We interviewed advisers with a range of industry experience and asked them about four key areas:

- How and when they introduce protection in client conversations
- What weight they give to protection products in the broader conversation
- The common client barriers and objections, and how they overcome them
- What defines a successful protection adviser?

Not only did the research reveal 5 key traits of top advisers, but it also highlighted several barriers and challenges facing some advisers. This could be overcome if advisers adopt a range of approaches and practices when talking about protection with their clients.

Key to a winning formula?

The research revealed top advisers commonly display 5 key traits which contribute to their overall approach to protection. They are:

1. Passion and stories
2. Assertive conversations
3. Cycle of confidence
4. Process
5. Repositioning protection

The report shares more about each of these traits, as well as how you can start building your own pathway to success.

More insights to come

The Secrets of Protection Success report marks the start of a new educational initiative for advisers. We’ll share a range of guides and resources that delve deeper into each key trait to help you achieve better outcomes.

Download the report