

TRADITIONAL AGENCY

PRODUCTIVITY

- Training & Meeting
- Warm Leads
- Cold Leads (Roadshow, cold calling etc)
- Referral



- Excel Sheet Resources
- Slide Deck



- Company Packages
- Mentorship & Environment

AGENCY BRANDING



- Sharing of office culture / events etc
- Gratitude post

WITH OUR ECOSYSTEM

PRODUCTIVITY

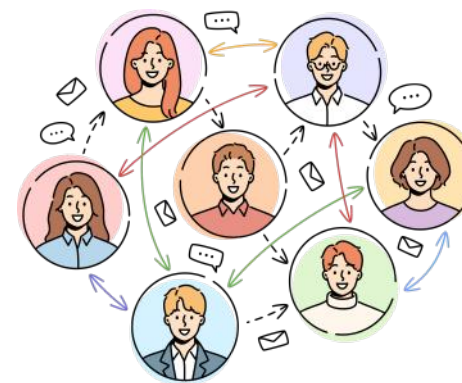
Increase Skillsets

Instant policy enquiry, business ideas generator, along with other tools in place to enhance skillsets



Building Community

Leverage on rewards and points system to increase passive and active referrals.



Business Tools

MyWealthBoard & InvestView to aid in portfolio/strategy crafting, with it created for consultants in mind,



RECRUITMENT

Easier Recruitment

Ecosystem & Video to showcase during recruitment



AGENCY BRANDING

Increase Recruitment

Social media of thanking agency for investing in tools, "Only in... we have these tools"

