



2018 MDRT Annual Meeting e-Handout Material

- Title:** A Systematic Approach to Attracting Quality Clients and Consistently Achieving MDRT
- 利用系統化策略吸引高品質客戶，持續達到MDRT門檻
- Speaker:** Chi Hong (Ben) Un, RFC
- Presentation Date:** Tuesday, June 26, 2018
- Presentation Time:** 2:00 - 3:00 p.m.
- Session Room:** Regal L.A. Live Premiere

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Million Dollar Round Table
325 West Touhy Ave.
Park Ridge, IL 60068 USA











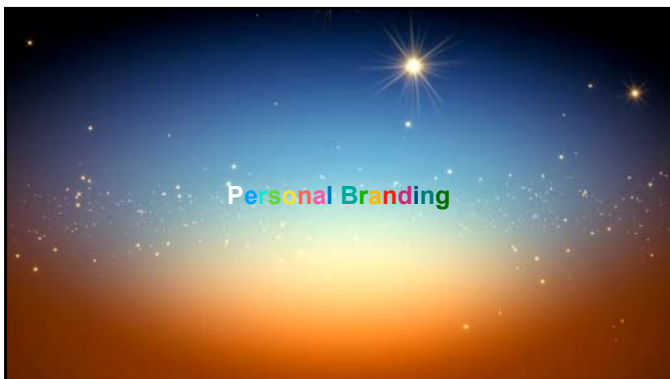
傳統宣傳模式-電視廣告



低頭族

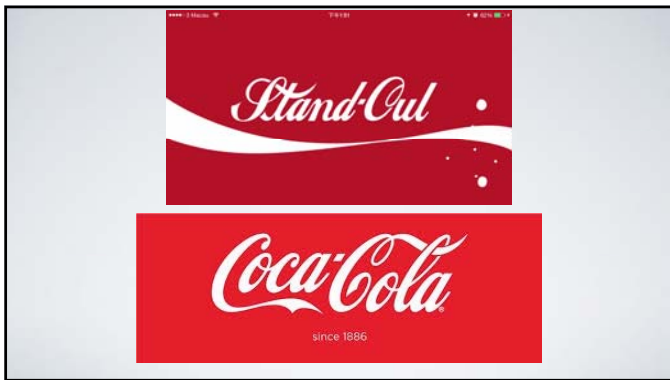


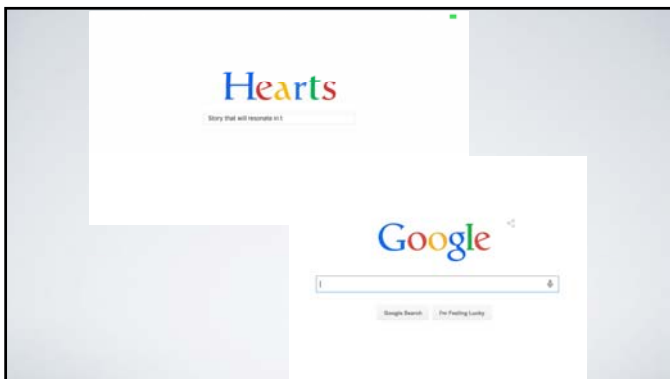




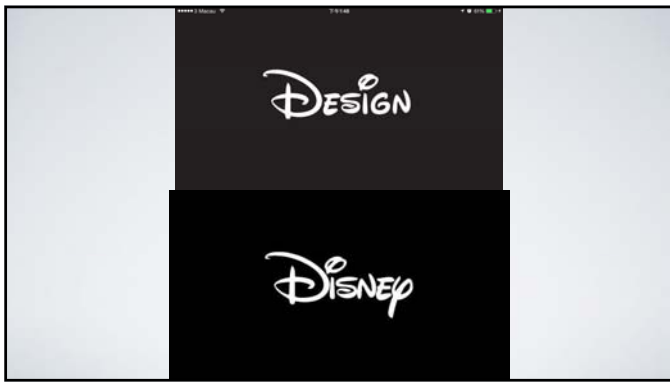
品牌定位

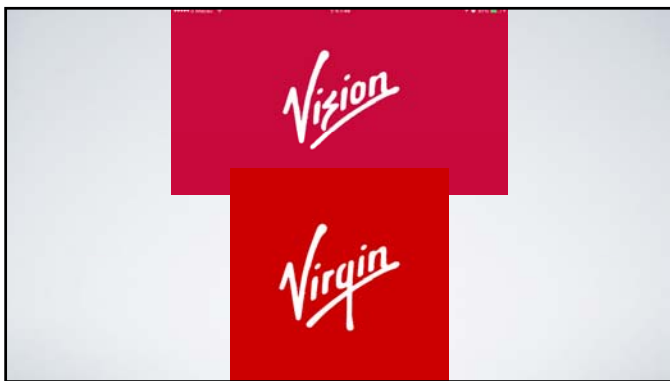
目標群體

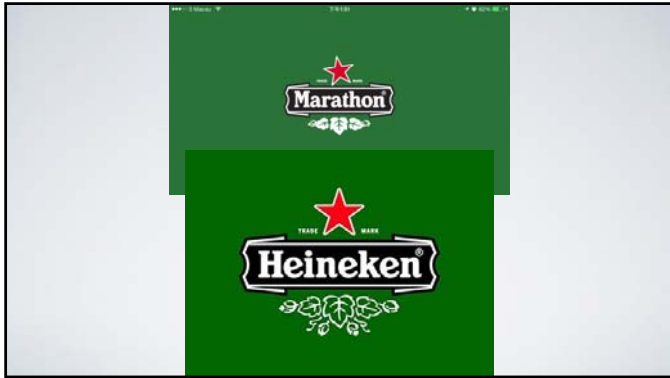


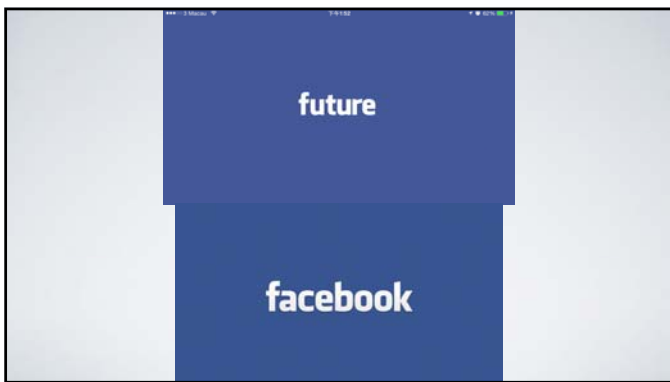




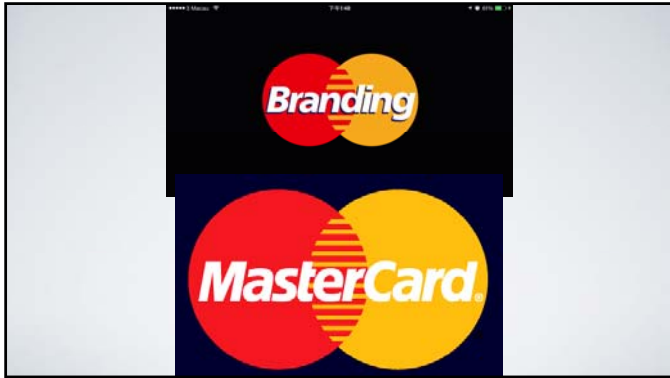


















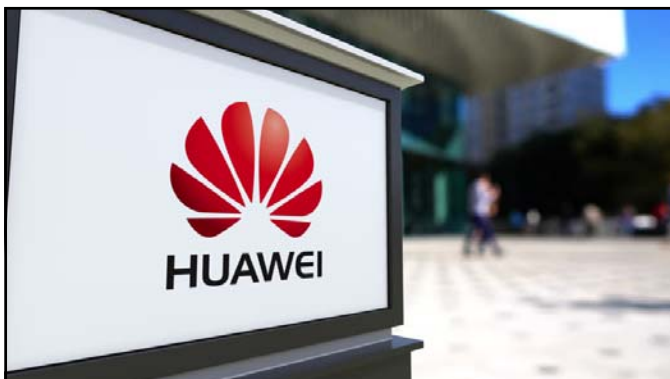
VALUES
VISION
MISSION
BRANDING

-你值幾錢？-
-品牌效應-

Success
Attracts
Success







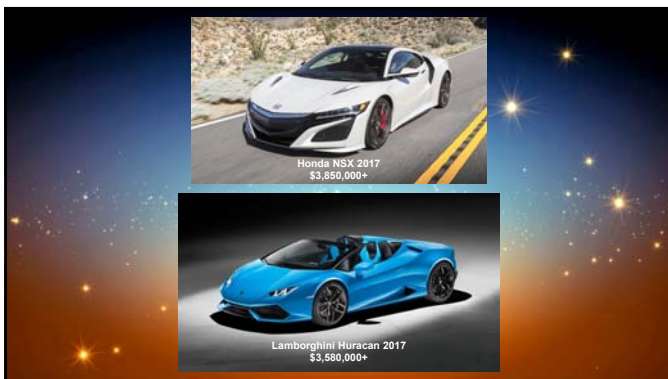




















Feedback

Echo



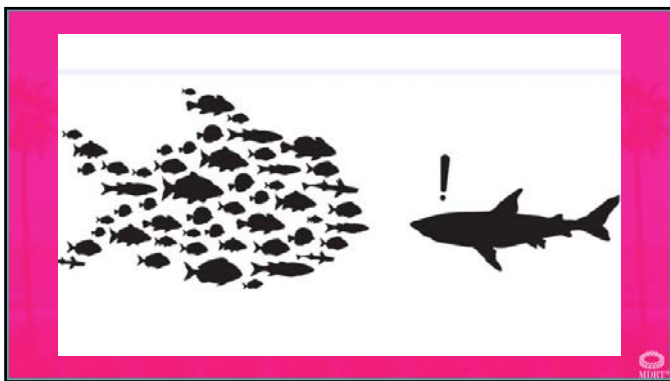
全人理念 工作以外



小幽默 大成果











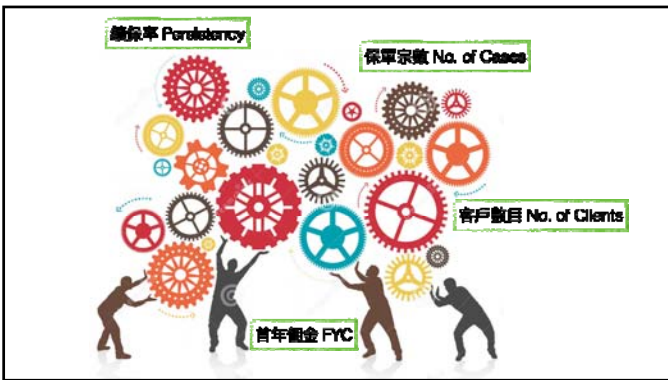












大數據 有效輔導

目標 拖延症

大->小目標 緊密監督



監督
每天 每週 每季 每年







舉個例子:



是可以用努力打回來的!

方法:

每天3.9.9



保單宗數目標: 首年佣金目標: Head Count目標:

4 宗 每月為標準(每星期開單) 40,000 / 月 為指標 4/ 月 為指標

6 宗 為目標

10 宗 為理想



獎勵 激勵



如何達到目標?



活動量
Activity



態度
Attitude



知識
Knowledge



技巧
Skill



習慣
Habit

風險型? 平均型? 投資型? 儲蓄型?



分析1: 成功銷售的產品

如偏重某一方面,是甚麼原因? 客戶群的問題? 能力問題?
安排培訓去加強?
目標是平衡什銷售組合(Balance Sales Portfolio)

改善型質・提升信質・縮短八周時程



業績增長? 客戶數目增長? 保單宗數增長? 每張保單平均佣金數增長?




分析2: 歷年的成績


**可以清晰看到業務員正在上升的軌道上
佣金數則逐步當中, 趨於相反**



例子: 小里



	FYC	Cases	Average
2012	156,327	18	8,685
2013	183,664	32	5,740
2014	353,121	45	7,847
2015	865,245	35	24,721









分析每週活動質量:

標準:

新客戶數量	約會數目	做到資料搜集	建議書	成功銷售個案
20	10	5	3	1

實際?

新客戶數量	約會數目	做到資料搜集	建議書	成功銷售個案
50	20	15	5	1

 擅長尋找新準客戶
資料搜集技巧好

 約客技巧要加強
加強爭取做建議書銷售的機會
更多建議書銷售的培訓演練

提升對市場行情及經濟前景・把握下區・
提升marketing技巧, 提高競爭力及自信



搵出自己的比率