



BenefitLab.ai

Where benefits knowledge meets practical AI.

Leverage for Insurance Agents

Part 2

Creating Leverage



Lesson 14: Strategies Need
Solution Providers



Knowledge



Strategy



Growth

Knowing Is Not Enough

- Knowing a strategy is not enough if you do not know who delivers it or how it works in practice.



PAIR STRATEGY WITH EXECUTION

- True leverage comes from pairing strategy knowledge with execution capability.



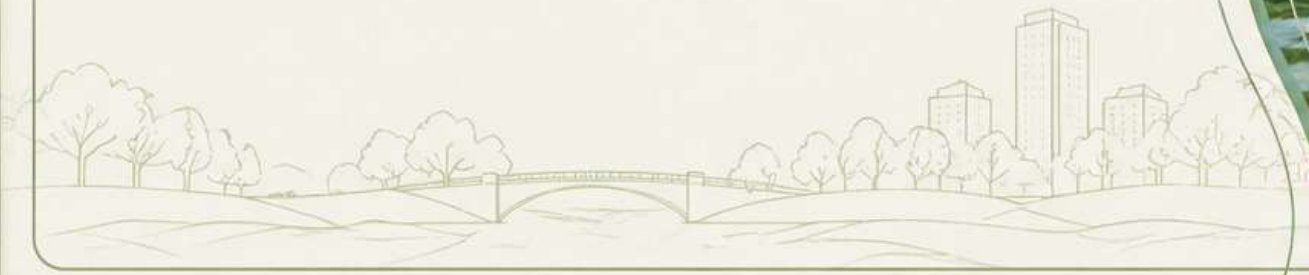
WHAT THIS LOOKS LIKE

- Who provides it
 - How to quote it
 - How it is implemented
-
- You know which vendors provide the solution.
 - You understand how to quote it.
 - And you understand how implementation works.



Otherwise It Breaks Down

- If you don't have this, you end up pausing in the middle of the process.
- You have the idea, but you can't move forward with it.



Prepare in Advance

- The trick is to prepare in advance so you are not figuring things out in real time.



REAL-TIME WORK CREATES FRICTION



Real-time work creates delays and friction.



You are searching, asking, and trying to piece things together while the client is waiting.



You're basically flying by the seat of your pants.



And that's when things slow down and start to break.



You're also dependent on someone else's timeframe. You can't control how quickly a carrier gets you appointed and gets you up to speed.



PREPARATION CREATES SPEED



Pre-built knowledge and relationships allow you to act quickly.



You already know who to go to and what the next step looks like.



FROM REACTIVE TO READY



- This is a shift from reacting to opportunities to being ready for them.



A Strategy Without a Solution Provider is Just Trivia.

STRATEGY WITHOUT
A SOLUTION PROVIDER



Trivia

Interesting to know,
but it doesn't go anywhere.



STRATEGY WITH
A SOLUTION PROVIDER



Action

Connected, implementable,
and valuable to your clients.

WHERE YOU FIND SOLUTION PROVIDERS



A big question is —
where do you **actually** find
these solution providers?



A lot of it comes
down to **exposure**.



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Local and Industry Groups



- NABIP / local associations



- Professional development days



- Sponsored events

- Going to local association meetings, like NABIP chapters, is one of the easiest ways to get exposed to new vendors.
- Especially when they have professional development days with sponsors.



Conferences and Exhibitor Halls



- Conferences are even better.



- Walking through an exhibitor hall gives you exposure to a wide range of solution providers in a short amount of time.



- You start to see what's out there and what might fit your clients.



Benchmarking Connection



- You will also hear about solution providers through benchmarking.



- Conversations with other agents often surface who they are using and what is working.



General Agencies as a Resource



- Another place to find solution providers is through general agencies.



- One of the big advantages of working with a general agency is that they already have relationships with a wide range of vendors.



- That gives you access to options you might not find on your own.



The Key Is Action



- The key is not just learning about these options.



- It is taking the next step and getting set up.



- So when the opportunity comes up, you are ready to actually implement the solution.



Simple Rule



- If you recommend it, you should know how to implement it.



Once you're prepared like this, you don't have to do **everything yourself.**



- You can start relying on the right people and partners to execute.



- And that's where the next form of leverage comes in.



What do you think?



Do you agree that “a strategy without a solution provider is just trivia”?

