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For more information please contact

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ABOUT THE CLIENT

Manulife Financial is a leading Canada-based financial services group with principal operations in Asia, Canada and the United States. The company's international network of employees, agents and distribution partners offers financial protection and wealth management products and services. These products and services include individual life insurance, group life and health insurance, long-term care services, pension products, annuities, mutual funds, banking products, institutional asset management and reinsurance solutions.

BUSINESS NEED

During the annual education conference, Manulife wished to provide their top selling advisors with information on how to stay successful when selling to the next generation. Because this training was to take place in Hawaii with spouses in the audience, the company wanted a presentation that was informative, convincing and entertaining.

INSIGHT AND IMPACT

Cam Marston and Manulife recognized that the company's top advisors were primarily Baby Boomers selling to other Boomers and Gen Xers. They also realized that the Millennials represented a remarkable untapped market, not currently being pursued by the company's best. Cam provided the research and analysis to demonstrate that Canadian demographics were, indeed, following the same patterns as Millennials. Through stories and statistics he demonstrated how the delayed adulthood that halted sales efforts to this generation in the past creates an excellent opportunity to reach out today with the right message and delivery. To be engaging and accessible to all members of the Canadian audience, the presentation included French translation of all slide content. Cam helped Manulife underscore the importance of generational selling through an advance welcome video email sent two weeks before the event, introductory and closing videos, and a follow-up video that reinforced the learning helped keep the conversation alive, even after attendees were far from the agreeable Hawaiian weather.