

The HPN UNIVERSITY



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Miguel Taveras has over two decades of experience in sales, sales management and distribution development in the life, health insurance and Financial Services. Miguel has developed hundreds of leaders, teams and businesses multinational. Miguel has a passion for learning and development; he is an active member of NAIFA, GAMA and LIMRA Miguel is past chair for the LIMRA diversity committee; a group of peer companies sharing how to target the diverse markets in America. He holds a business degree and the Chartered Leadership Fellow designation (CLF®) from the American College of Financial Services. In addition, Miguel will complete the LIMRA Leadership Institute Fellow (LLIF) in 2018.

Miguel was born in the Dominican Republic and grew up in New Jersey. Miguel is fully bilingual. He's a proud father of three children; Miguel Jr., Diana and Gia. Miguel enjoys Yoga, running, traveling, reading, and holds a private pilot licenses from the FFA in the United States and the DGAC in Chile.

Leveraging Virtual Resources

by Miguel Taveras, CLF® LLIF

As the Coronavirus continues to cause panic and create challenges, there are opportunities for those who are “doers” and committed to continuing to assist their clients. Think about it... what can you do? The answer is you can only do what you are able to do. You can't control the reaction of others, but you can offer assistance and advice to those you desire to help.

Opportunity

Are clients still going to be concerned about protection products? You bet! This is a time to proactively contact everyone in your network to ask them how they are doing, how they are feeling - but most importantly, to help them see how important it is to take defensive action by reallocating a certain percentage of asset to cash as a protective measure in case something should happen to them.

Virtual Meetings

According to recent studies more than 1/3 of sales meetings for life insurance are happening virtually. Today everyone has the ability to connect visually using Face Time, WhatsApp, or Zoom applications regardless of the distance. Now that we are facing the most recent coronavirus outbreak, we can continue to help our clients while avoiding infections by leveraging virtual tools to conduct our meetings. Many organizations are already using similar processes to submit cases, complete underwriting, and deliver policies electronically.

Training Delivery

While we may not be able to currently leverage the same level of in-person training practices as we have in the past, alternatives are available. Just as technology offers the opportunity to meet with clients and conduct business, it also works for training. Leaders can quickly convert to conducting one-on-one and group sessions virtually. It also provides the opportunity to meet more frequently and to hold more meetings.

HPN University

There are many resources available but few as user-friendly and on-point as the HPN University! The platform offers content in English, Spanish, French, Chinese, and several other Asian languages. With it, leaders can prescribe learning paths to continue to upskill their representatives and advisors. Leaders can also run evaluations to see where to help advisors individually with the many coaching tools and systems available within the platform. Do you need to host a virtual classroom session? You can do that too! The platform has over 100 training guides with videos to ensure consistent, world-class, scalable training.

Conclusion

When faced with the craze of the panic, markets volatility, you may be wondering “What can we do”? The answer is “Do what you CAN”. You can call your prospects and clients. You can meet with them virtually and check in with them. You can conduct a discovery, fact-finding, and collaborative session via video. And you can use the training learned on a platform like HPN’s University to ensure you do the very best your consumers deserve.