

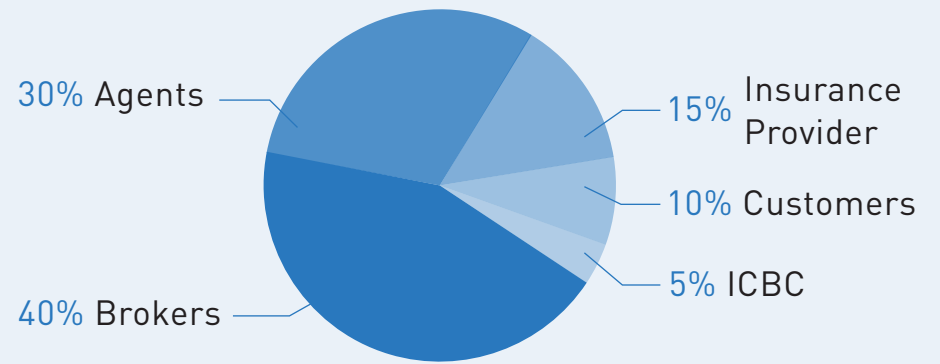
In Insurance Broker, 25

Nick Chan

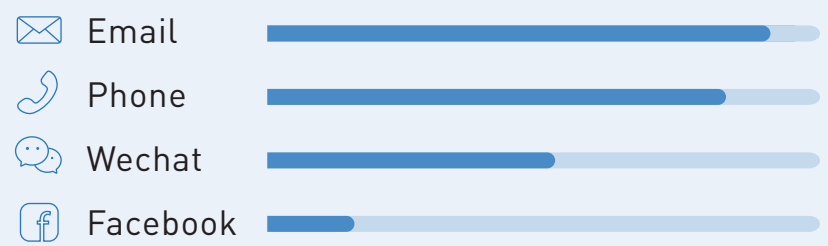
"I enjoy the social aspect of my job and the opportunity to build connections with those around me"



NICK'S SOCIAL NETWORK



COMMUNICATION PLATFORM



SKILLS



General insurance licence Level 1



Fluent in Cantonese, English, and Mandarin



Customer service



Communication skills

BIOGRAPHY

Nick is a recent graduate from UBC Sauder School of Business. He has dreams of **starting his own business** in real estate and is currently in the process of **building up his personal network** and income in order to do so. This is also part of the reason why outside the agency, Nick also has a part time job as a Sales Coordinator at one of city's largest development firms.

GOALS

Though relatively new to the agency, Nick works hard to try and establish himself as an **efficient, diligent and reliable broker**. He does this to gain the trust and respect of his colleagues and clients within the agency. He hopes that by doing so, he will be able to **carry this network** along with all the experience and knowledge he gain from the agency with him in his future.

CONCERNS

Nick's job requires him to be the middle-man for all parties in the insurance process chain. As a result, Nick needs to continually go through the draining process of **communicating back and forth with agents, customers, and insurance providers** to validate, update and process information and documents. These tasks unfortunately put Nick in a very vulnerable position in the insurance chain. Any hiccup such as **late replies** or **incomplete and invalid information** for a party will succumb to additional work for Nick.



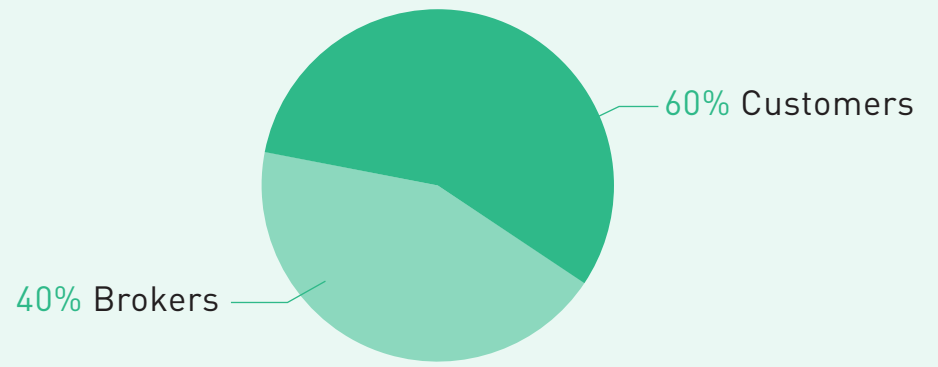
Insurance Agent, 46

Peter Ming

"I cherish the relationship I build with my customers, they have become an extension of my family"



PETER'S SOCIAL NETWORK



COMMUNICATION PLATFORM



SKILLS



Insurance knowledge



Fluent in Cantonese, English, and Mandarin



Customer service & Socializing



Sales and persuasive skills

BIOGRAPHY

Peter is the agency's **top producer** and has been so for the last year and a half. It is easy to understand how as Peter's **outgoing personality and charisma** makes him very approachable. On top of that, he is **hardworking** and will often go out of his way for his friends and customers. Peter has become a **family friend** to most of his customers since he has supported many of them for many years.

GOALS

Peter **values the strong relationships** that he has built with his clients over the years. He strongly values the trust that many of them bestow on him to handle their insurance matters for them. Peter is always aiming to **build deeper connections** with his customers so that many of them will **continue their relationship** with him over the years.

CONCERNS

Fact is, the insurance process doesn't rely on Peter alone as he needs to work with insurance agencies to process the requests for his clients. Because of this, Peter often faces **unnecessary criticism and backlash** over the slow processing time of the insurance claims that are out of his control. Peter is ultimately concerned about this as he feels this often **hinders the relationship with his clients**.



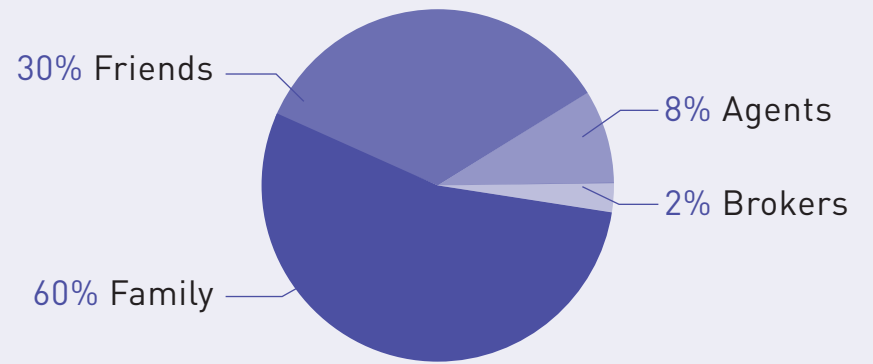
Housewife, 42

Lisa Wong

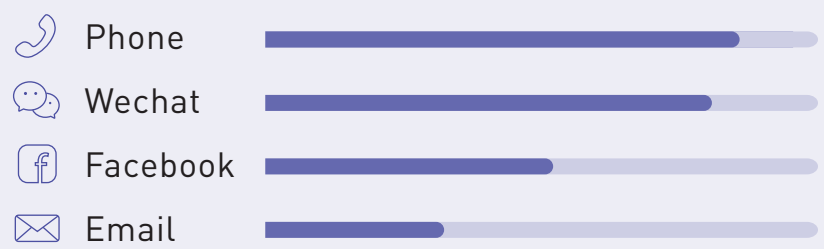
"If an agent can handle my insurance matters, and help me manage all the tasks on my plate, that's a good agent!"



LISA'S SOCIAL NETWORK



COMMUNICATION PLATFORM



SKILLS



Financial management

BIOGRAPHY

Lisa Wong is **busy housewife** who is raising two teenage boys aged 17 and 25. Lisa is one of Peter's long term and has been **working with Peter for close to 8 years**. She was introduced to Peter by a former coworker when she immigrated to Vancouver and has been working with Peter ever since. Lisa considers Peter as a family friend.

GOALS

Lisa has a lot on her plate already with managing the finances for her family and also raising her two boys. She likes that she can **trust and depend on** Peter to handle her family's insurance matters for her so that she doesn't have to worry. Generally, Peter tends to be **quick and efficient in handling the insurance matters** for her which is something she strongly values.

CONCERNS

In the complicated cases, Peter needs **more time to process and respond**. Lisa is usually fine with that since she trusts Peter a lot. However, in terms of emergency, Lisa **feel very uncertain that she is not able to track her insurance process** without Peter. In addition, when Lisa first time encounter a new type of accident, she **feels insecure because she does not know about the insurance policies and coverage**.

