Whole Life Up Close
An Educational, Interactive App

The Design of Whole Life Up Close
Whole Life Up Close is an educational iPad app designed to help advisors not just explain, but *convincingly demonstrate* the mechanics, benefits and unique value of whole life insurance to potential clients. By leveraging the dynamic capabilities of the iPad, this cutting-edge sales tool effectively bridges the gap between static, copy-heavy sales literature and multipage, number-heavy illustration ledgers. It also brings to life popular whole life sales concepts through interactive infographics and tools – and allows financial professionals to customize the learning experience by tailoring it to a prospect’s situation.

Research Led the Development of the Whole Life Up Close iPad App

Advisors are increasingly turning to tablets for professional use
- According to LIMRA, over 40% of advisors surveyed own tablets and of those, more than 60% use them in the education and sales process
- The number of advisors leveraging iPads continues to steadily climb
- ‘Convenience’ and ‘Ease-of-use’ are regularly cited as top reasons advisors embrace tablets

MetLife research indicates demystifying whole life will unlock sales opportunities
- Many advisors are not familiar with whole life and shy away from it because they find it difficult to understand and/or explain, making its higher cost hard to justify to consumers
- Most consumers are not familiar with whole life either — the limited knowledge they have is that it’s complicated and costly
- However, once consumers clearly understand the core benefits and unique value it offers, many are willing to seriously consider whole life’s higher premiums
- Unfortunately, even advisors experienced with whole life have difficulty explaining and consumers have difficulty understanding many of its most compelling core features and benefits (like policy value growth due to dividends)

Shifting from print to digital media can gradually reduce expenses
- Reframing multiple print content into one electronic experience, which has a longer shelf-life and is easily updated, allows us to ‘shift and shave’ marketing expenses
Expected Benefits of the Whole Life Up Close iPad App

- Create buzz and generate exposure for whole life through an innovative, industry-leading sales tool that adds to MetLife’s value prop for advisors
- Increase number of advisors across retail channels selling MetLife whole life by educating them on how it works and the value it can provide clients
- Increase sales among advisors already selling MetLife whole life by making it simple and easy for them to educate prospects on how it works and what it can do

For more information, please contact the life sales desk.