



Live with confidence

BlueStar Business Conference 2024

Fhumi Tema





Welcome to the BlueStar Business Conference 2024

Transforming Moments into Masterpieces





Introducing Fhumi Tema

Head: Distribution Enterprises



Transforming Moments into Masterpieces





Transforming Moments into Masterpieces

- ⌚ The theme highlights the **power of moments**, conveying that every client interaction or engagement has the potential to create a **lasting positive outcomes** for both the client and the intermediary.
- ⌚ Our vision: To be the best at **building enduring relationships**, to help our clients achieve their financial goals.
- ⌚ The concept of a masterpiece symbolizes the precision, **craftsmanship**, and **creativity** needed to excel in the financial advisory space.





Turning Your BlueStar into a Masterpiece





Turning Your BlueStar into a Masterpiece

- ⌄ **Trust** remains a cornerstone of client-adviser relationships.
- ⌄ **Financial coaching** can differentiate a BlueStar adviser by fostering deeper, more consultative relationships with clients.
- ⌄ Forward-thinking BlueStar practices adopting **phygital** models that combine digital and in-person touchpoints for optimal client engagement.
- ⌄ Evolve BlueStar practices into **industry benchmark**.





Harnessing the Power of Data





Data-Led BlueStar

- ⌄ **Data-driven insights** allow BlueStar advisers to better **understand client needs**, improving service personalization and customer satisfaction.
- ⌄ **Holistic client engagement** leveraging data analytics –
 - ⌄ Cross-sell opportunities
 - ⌄ One view of clients





Transforming Moments for Advisers

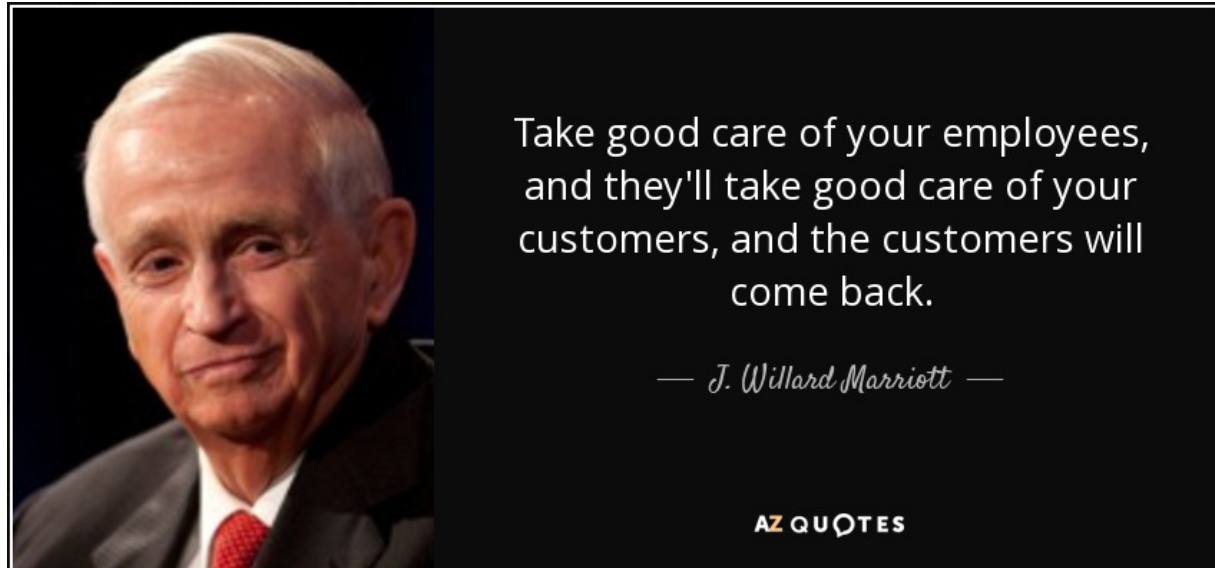




Organizational Human Dynamics



- ⌄ **People are the backbone** of any successful organization, and fostering a positive culture is key to retaining top talent.
- ⌄ **Diversity** in thought and experience leads to innovation and a more adaptable, resilient team within BlueStar practices.
- ⌄ **Effective collaboration** and clear communication within teams directly impact productivity and client satisfaction.





Transforming Moments through Leadership





Talent Management of Advisers

- ⌚ **Attracting and retaining advisers** - ensures consistency in client relationships.
- ⌚ **Development of skills and expertise** – to offer best advice to clients.
 - ⌚ Building trust and long-lasting client relationships.
 - ⌚ Improving customer satisfaction.
- ⌚ **Succession planning** - a pipeline of advisers ready to step into key roles when necessary.
 - ⌚ Treating our customers fairly.
 - ⌚ Prevents disruption in client service.





Looking Ahead





Vision for the Future

- ⌄ **Relationship-led Advice** as competitive differentiator.
- ⌄ Sanlam aims to build a future where BlueStar practices can provide **world-class financial planning** tailored to evolving client needs.
- ⌄ Enabling delivery of frictionless “**ease of doing business**” client and intermediary experiences.





**Thank you &
Welcome**



Sanlam

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