

CE Course Outline

The Digital Broker Playbook

Summary – A Broker’s Practical Guide to Protecting, Growing, and Digitizing a Client Base.

Training/Class Instructor: Eric Silverman

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8 minutes

- The Impact of Technology on Small Business
 - Software as a Service
 - Transformation to SaaS is Accelerating

8 minutes

- The Transition to “All-in-One” Solutions
 - The Broker-Employer Relationship
 - Benefits Alone are no Longer Enough
 - Benefits, Payroll, and HR are Emerging as a Result

9 minutes

- The Modern Competitor
 - Small Group – Historically ignored, but now the Focus
 - Analysis of the Economics – Small Group
 - The Origins of Today’s All-in-One Providers
 - Digital Disrupters and why they are a Threat

15 minutes

- Action Steps to Bulletproof your Book
 - The Modern Broker-Employer Relationship
 - High-Level Action Steps
 - Analysis of the Economics – Small Group
 - Perfect Your ‘All-in-One’ Strategy
 - Scale a Consistent Delivery

10 minutes

- Increase the Value of your Agency
 - Consumerization of Healthcare
 - Voluntary Benefits
 - Improve Your Exit
 - Choose Partnerships Carefully