

CE Course Outline

Voluntary Disruption: How to Optimize Client Engagement to Maximize Agency Revenue

Training/Class Instructor: Eric Silverman

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March 5, 2019 – 10:30am to 11:30am

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20 Minutes – 10:30am to 10:50am

- Is your view of “voluntary benefits” considered “status-quo”...?
- How do you define “voluntary”?
- What are “enhanced benefits”?
- As a broker, do you fall into 1 of the 4 most common “voluntary” categories?
- How can you move your practice and your employer’s groups away from the “status-quo”?
- Do you apply a bespoke strategy in the industry known as voluntary, for all of your employer group clients?

10 Minutes – 10:50a to 11:00am

- Let’s look at a “single page summary” sheet that would deliver to your clients the following:
 - Mission
 - Purpose
 - Findings
 - Proposed Solution
 - Moving Forward/Action Steps
- New programs, services, ideas that are available within the marketplace to consider for your clients.

15 Minutes – 11:00am to 11:15am

- Key take-aways/actionable ideas that can be implemented immediately.
- The conversation template to use with your clients to spark their interest and help them achieve thorough understanding of the “why” behind these new strategies.
- Key questions to ask when seeking an enhanced benefits partner.

10 Minutes – 11:15am to 11:25am

- A few quick sample case studies to illustrate the success clients can achieve when implementing ideas discussed within the class.

5 Minutes – 11:25 to 11:30am

- Questions