



Clients Hire You to be Led.™ 2024 Client Service Academy Programs

Your ambitious growth targets face a pressing risk -
an industry-wide talent shortage.

Outperform your competitors by investing in the teams that do the work.



Jumpstart a career or supercharge your firm's onboarding with an on-demand program to make new(er) hires team ready. Let us "teach the business" so your managers can prioritize "on-the-job training." Asynchronous learning modules cover an overview of the Employee Benefits ecosystem, the client lifecycle and specific examples of career success in a brokerage firm. 10 embedded activities will indicate how employees process information, follow direction and take initiative for managers early and objective assessment.



Modernize and uplevel project management and communication skills for Account Managers of any experience level with a three-month, cohort-based program. Asynchronous learning modules cover insurance basics, industry insights and implementation best practices contextualized within the client lifecycle. Weekly activities prompt in-agency connections, scenario planning and habit formation. Employee Benefits client service veterans facilitate weekly peer sessions and provide 1:1 coaching to accelerate growth at any level.

We also offer an express self-directed asynchronous version of the Account Manager Academy that features the same learning modules and activities, without the live weekly cohort meetings or 1:1 coaching.



Equip Account Executives - at any phase in their career - with the industry knowledge and confidence to strategically lead clients and maximize impact. Offered one time a year, the six-month program combines asynchronous learning modules and twice-monthly cohort sessions to enhance client leadership skills. GenuineShift founder Jenn Walsh facilitates peer sessions and provides 1:1 coaching so executives find the capacity to say "yes" to additional challenges that optimize personal and firm growth.



Bolster Account Executive or Account Manager Academy Alumni's knowledge, skills, and confidence with continuous peer collaboration and real-time coaching from GenuineShift founder Jenn Walsh. Alumni-only peer sessions and full access to updated 2024 Client Service Academy portal content for their program.



Clients Hire You to be Led.™ 2024 Client Service Academy Programs

Our industry-leading programs offer affordable solutions to quickly and consistently onboard new employees, efficiently level up junior colleagues and supportively recharge invaluable veterans.

Equip client service teams with contextualized knowledge and practical project management and communication skills. Proven practices will increase capacity for growth, nurturing your team to do great work with less stress.

Program	Length	Start Dates	Investment
Intro to the Employee Benefits Business	3 Months Access	On Demand Self-Paced	\$500
The Account Manager Academy - Express	3 Months Access	On Demand Self-Paced	\$1500
The Account Manager Academy*	3 Months**	February, March, April, May, June Cohorts	\$3000
The Account Executive Academy	6 Months**	February	\$5000
The Account Executive Alumni Community	6 Months**	February	\$2500
The Account Manager Alumni Community	6 Months**	February	\$1500

*Firms with 20+ Account Manager participants eligible for custom cohort solutions. Pricing upon request.

**Program participants will be invited to participate in our Q4 Readiness program. Held August - September 2024. Facilitated by Jenn Walsh.