

CLIENTS HIRE YOU TO BE LED.™

EMPLOYEE BENEFITS CLIENT SERVICE ACADEMY

2022 Program Guide

To have a conversation about program fit, contact
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CLIENTS HIRE YOU TO BE LED.™

GenuineShift delivers unbiased business consulting and proprietary programs that fuel growth, optimize profitability, and minimize friction for insurance brokerage firms of all sizes. The firm's Client Service First Framework™ is the foundation of every engagement.

Our industry-leading programs equip Client Service teams with modern skills and time-tested practices to increase capacity for growth while doing great work with less stress.

Our cohort-based academies are designed to address the industry's talent crisis. If you're interested in recruiting and retaining high-performing Client Services teams to lead with confidence, let's get started.



JENN WALSH

Founder, GenuineShift

Lead Coach, Account Executive Academy & Benefits Specialist Bootcamp

Jenn has 31 years of hands-on experience driving organizational growth as a salesperson, business development leader, agency owner, strategic consultant and coach.

She developed her Employee Benefits expertise within insurance carriers, a full-service brokerage firm and by holding several national industry association leadership roles. A sought-after speaker, workshop facilitator and objective advisor, she's increasingly focused on the interdependence of successful sales and service teams.

Known as an authentic business partner, she's passionate about inspiring and preparing teams to lead clients with confidence.



JAN CURRIE

Lead Coach & Facilitator, Account Manager Academy

Jenn and Jan worked together for years, so when the time came to expand programming to Account Managers, what better choice than "the best Account Manager, perhaps ever."

Organized, efficient and effective, Jan brings 25+ years of consulting experience to the inaugural Account Manager Academy. She has direct experience solving complex client problems while maintaining high client satisfaction and retention rates. In her independent consulting business, Jan lends insights and provides interim project support to employee benefits brokers, HR executives and other professionals informed by her degree in industrial & organizational psychology.

Based on the core fundamentals of the AE Academy, Jenn and Jan developed content and activities that will supercharge Account Managers. Jan's experience as a Client Service team supervisor will be invaluable as she leads discussions in weekly live coaching hours.

Account Manager Academy

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The Account Manager Academy responds to our industry's talent crisis by providing the in-depth training + coaching most firms can't provide. The three-month program covers industry insights + insurance basics in a community coached by employee benefits client service veterans. What's the difference between struggling and succeeding (even when things go sideways) in this role? We'll cover that in 12 lessons following the employee benefits client lifecycle.

12 On-Demand Learning Modules following the Client Lifecycle:
(Strategic Planning, Renewal, Marketing, Open Enrollment, Post OE, etc.)

40 hours Live Coaching available over 3 months

Three Industry Trends & Opportunities Webinars, Hosted by Jenn

Unlimited VideoAsk aka Ask The Expert

SHIFT Your Intro Course

Investment: \$2500	Program Starts: January 1st, April 1st, and July 1st	2 hour weekly commitment to maximize your investment: 1 hour of live coaching 30-minute online module 30-minute in-agency assignment
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Recognize anyone on your team?

Note: This may be an Account Coordinator, Account Representative or Analyst at your firm.



NEW NANCY: Whether a new college grad or mid-career transfer, she wants to gain an understanding of the role as quickly as possible. The three-month Account Manager Academy provides another tangible way to show her engagement and readiness. In-agency assignments create connections in remote or hybrid work settings. She'll bring questions to supervisors.



TRANSFER TOM: A strong performer in another department in the firm, he'd like to transfer to employee benefits. Supervisors want him but are stretched for time to get him up and running. While still performing his current role, have him participate in the Account Manager Academy so that when he transfers he'll have a strong foundation about the business.



COVID CAROL: Hired or promoted during the pandemic, she'd benefit from additional training. She jumped in at "season six" and needs to catch up on the first five seasons (i.e. gain industry knowledge + fill gaps.) She's benefitted from on-the-job experience but would accelerate her learning and maximize impact by collaborating with a coach and learning from peers.



BURNED-OUT BRET: They're not sure if they've stalled because of COVID, lack of training, or boredom in the role. Are they frustrated because they haven't been promoted? Do they feel unappreciated? The Account Manager Academy will provide a framework to help Bret refresh and reset their role so they're less stressed and clients get great work.



LONGTIME LOUSIE: A proven high-performer in client service, she's mastered the basics of how things are done at your firm. She's supervising a team (or will in the future) and is interested in getting ideas about how to improve processes and train the newest hires to your practice. She may even be interested in transitioning into the AE role after increasing confidence.

Account Executive Academy

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The Account Executive Academy was created to help firms grow. It's a 6-month program designed for lead client executives every firm wishes had more capacity and confidence. After the core program, they unlock the benefits of the community for the balance of the calendar year. January & April cohorts receive bonus months.

- 10 On-Demand Learning Modules
- Monthly Cohort Call (first three months)
- 2 AE Academy Community Discussions per month
- Unlimited VideoAsk aka 1-800-ASK-Jenn (1:1 coaching)
- Optional 30-minute "office hour" after the group sessions
- SHIFT Your Intro Course
- Bonus Media (book + podcast) Recommendations
- Lifetime access to Jenn's closed LinkedIn Group

Investment:
\$4800

Budget Flexibility:
Pay in December
2021 or defer to
2022

Enroll By:
December 1st,
March 1st or
June 1st

Program Starts:
January 1st,
April 1st, and
July 1st

Recognize anyone on your team?

Note: This may be a Client Executive, Consultant, or Senior Account Manager at your firm.



BATTLEFIELD BETTY: She's a high-performer who got promoted earlier than expected (or will soon) as a result of staffing changes, sudden growth, or both. She understands how her firm works but is not confident (yet) in the Account Executive role. Having access to peers and coaches will accelerate her progress after her battlefield promotion.



TRANSITION TINA: A proven employee benefits professional, she wants to adapt her experience from HR or from an insurance carrier to the firm. The practice needs the experienced talent but supervisors are stretched for time and worried about getting her up and running and positioned for success. Especially in a hybrid work environment, access to peers will be invaluable in building her confidence.



DAY-TO-DAY DAN: He knows the fundamentals but has difficulty thinking strategically. He's frustrated about received feedback that he's not innovative or creative. Producers know he is a solid team player but need him to operate at a higher level in order to rely on him more heavily. He'll leverage the Account Executive Academy Community to increase his confidence in client management.



STRESSED SAM: They understand employee benefits but have difficulty getting out from under the tactical work and working strategically with clients. They are always SO busy and don't have the capacity for any new work. They know they need to delegate more effectively and/or work more efficiently but miss opportunities because they're always so busy.



LOYAL LUCY: A proven high-performer in client service, she's mastered the basics of how to serve the average client. She's ready to take on more complex + challenging clients and would benefit from learning from peers to increase confidence and creativity. She may also manage a team and will source ideas about how to improve processes for her practice.

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The Account Executive Academy began as a six-month program in 2019. The Alumni community was formed in response to the Account Executives' desire to continue collaborating with Jenn and their peers nationwide.

The 2022 program is available to any AE who completes the Account Executive Academy by December 2021. AEs who'd taken a break are invited to reengage with the program.

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2 AE Academy Community Discussions per month

Group Event with Jenn + Peers in San Francisco (March/April - TBD)

Unlimited VideoAsk aka 1-800-ASK-Jenn (1:1 coaching)

Optional 30-minute "office hour" after the group sessions

Quarterly sessions to discuss leading teams (whether or not they're direct reports)

SHIFT Your Intro Refresher (powerful business introductions)

Bonus Media (book + podcast) Recommendations

Investment: \$2400 or \$250 monthly	Budget Flexibility: Pay in December 2021 or defer to 2022	Enroll By: December 1st	Program Starts: January 1st
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Recognize anyone on your team?



ALL IN ANNIE: She's been engaged in the AE Academy since her firm initially made the investment. She appreciates the community and looks to the group for new ideas about how to serve clients & colleagues and brings them back to the firm. The program's framework provides extra scaffolding during these chaotic times. She has less stress and more confidence.



BRING IT ON BETTY: Always a high-performer on the team, she's ready to take on new challenges. This might be managing people or taking on more complex clients requiring greater technical knowledge. She relies on the AE Community to accelerate her knowledge. She benefits from strategic coaching from Jenn on how to level-up and do great work.



MANAGER MARY: Mary benefitted personally from the AE Academy. Her confidence shot up and she now understands that most challenges are shared by most firms. This allows her to be more grounded and less reactive as she's managing her team. She'll be onboarding and coaching new talent in 2022 and will rely on the AE Community to learn best practices she can adopt.



NEW FIRM FRANK: He got value from the AE Academy experience but exited the community when he chose to change jobs in 2021. His new firm is committed to learning & development and has sponsored him for 2022 so he can regroup with peers and continue to benefit from this one-of-a-kind program.



READY NOW RITA: She was partially engaged in her initial AE Academy experience. She was busy and juggling life, work, or a combination of the two. She's tired of feeling stretched-too-thin and is ready to commit to the programming and will benefit from the collaboration with peers in 2022. She and her firm know that it will be difficult for her to increase capacity or expand her role without additional coaching so she's decided to rejoin the group.

Benefits Specialist Bootcamp

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Benefits Specialists help teams create contrast and lead your clients. These colleagues are the difference between talk and execution. This program will help them operate more effectively and with increased confidence. Clients and other team members in the practice both benefit from their enhanced ownership of their role on the team. Curated content from the AE Academy is delivered in an efficient and fun series.

Week One: The Benefits Specialist Role (industry overview, serving internal & external clients)

Week Two: Time is a Commodity (calendar control, recommendations>options, clear communication)

Week Three: Who/What Grinds your Gears? (negotiating deadlines & deliverables, exploring why clients or colleagues don't understand or respond to what you need)

Week Four: Clients Hire You to be Led.™ (effective meeting dynamics, impactful introductions)

Four 90-minute workshops (Tuesdays 10 am PST)

SHIFT Your intro (complete 60-minute course before the last session)

Unlimited VideoAsk aka 1-800-ASK-Jenn (1:1 coaching) including 10 days post Bootcamp

Investment:
\$997

Budget Flexibility:
Pay in December
2021 or defer to
2022

Enroll by:
January 1st,
April 1st or
June 1st

Session 1: February
Session 2: May
Session 3: August

Recognize anyone on your team?

Seniority doesn't matter but they interact with clients on the phone, via email or in person. Specialists are also colleagues from Actuarial, Claims Advocacy, Communications, Compliance, International, Pharmacy, Technology, Underwriting, Voluntary, and Wellness departments.



COVID CAROL: Hired or promoted during the pandemic, she'd benefit from additional training. She jumped in at "season six" and needs to catch up on the first five seasons (i.e. gain industry knowledge + fill gaps.) She's benefitted from on-the-job experience but would accelerate her learning and maximize impact by collaborating with a proven industry coach and peers.



EXPERT ED: No one doubts his technical competence, but he has some trouble communicating in layman's terms. Producers need to showcase his expertise but he's received feedback that he's difficult to understand. Client service colleagues spend time interpreting his advice for clients. He'll improve his introduction and communications skills by participating in the Bootcamp.



NERVOUS NELLIE: Confident in her tactical responsibilities (or area of expertise), she dreads communicating directly with clients or attending finalist meetings. Whether a veteran or more junior, she's wrestling with how to be effective. Clear and confident client communication will maximize her contribution, reduce work (and stress) for others and accelerate her career.



WITHDRAWN WYATT: They're not sure if they've stalled because of COVID, lack of training, or boredom in the role. They used to be engaged within the practice but now feel a bit detached. The Benefits Specialist Bootcamp will provide a framework to help them refresh and reset their role so clients (and colleagues) get great work.



Member Feedback

A community of like-minded individuals with similar goals in the benefits consulting world that share ideas, concerns around clients, co-workers, and direct reports. We're led by a consultant that is a change agent to the norm and encourages us to break out of our box.

Kenra, Member Since October 2019

This is the best thing my agency has ever done for me.

Beth, Member Since October 2019

Jenn, you do such a great job of leading our meetings with real-life examples, and experiences. The AE Academy has helped me develop in so many ways.

So many nuggets to list - perspective, calendar control,

"Are we making ourselves busy?", I could go on.

In short, the AE Academy provides the tools to be a better AE.

Daniel, Member Since January 2021

This was one of the best trainings that I have experienced in my career. You made it around real life examples for us and fun throughout the whole program. The connections to other client managers was helpful in seeing that all of us are dealing with the same type of issues and sharing how they have overcome some of these challenges was helpful in my growth.

Stephanie, Member Since April 2021

A unique course that's given me a complete mind shift on how to approach complex situations internally within our firm and externally with our clients.

Jenny, Member Since January 2020

Life-changing.

Seriously, a lifeline in what can sometimes feel like isolating work.

Amy, Member Since October 2019