

Account Executive Academy

CLIENTS HIRE YOU TO BE LED.™

GENUINE | SHIFT

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.