

# Account Manager Academy

CLIENTS HIRE YOU TO BE LED.™

GENUINE | SHIFT

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: <b>\$2500</b>	Program Starts: January 1st, April 1st, and July 1st	<b>2 hour weekly commitment to maximize your investment:</b> 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.