

Benefits Specialist Bootcamp

CLIENTS HIRE YOU TO BE LED.™

GENUINE | SHIFT

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
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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.