

Beyond Insurance® Producer Development Boot Camp Agenda

Week 1: Classroom

Philadelphia, PA | October 1-2

Day 1, Oct. 1	Time
Continental Breakfast, Franklin Room	7:30 – 8:00
Welcome, Introductions, Overview of Process	8:00 – 8:45
Solving the Inexperience, Credibility, and Trust Paradox	8:45 – 9:45
Break	9:45 – 10:00
Developing a Powerful Personal Brand	10:00 – 11:00
Start with WHY	11:00 – 12:00
Lunch	12:00 – 12:00
Creating Your Credibility Statement, Role Plays	1:00 – 1:45
Break	1:45 – 2:00
Finding Your Niche/Specialty	2:00 – 2:45
Active Listening	2:45 – 3:15
Break	3:15 – 3:30
ORAI demonstration	3:30 – 4:00
Developing a Unique Value Proposition, Role Plays, Videotaping	4:00 – 5:00

Day 2, Oct. 2	Time
Continental Breakfast, Franklin Room	7:30 – 8:00
Day 1 in Review	8:00 – 8:15
Profiling and Attracting Your Ideal Prospect	8:15 – 9:15
Filling the Prospect Pipeline with Qualified Leads	9:15 – 9:45
Break	9:45 – 10:00
Leveraging LinkedIn to Drive Actionable Results	10:00 – 11:30
Break	11:30 – 11:45

Finding Offline Lead Sources including Creating a PREP Board	11:45 - 12:30
Lunch	12:30 - 1:30
Managing the Sales Pipeline	1:30 - 2:00
Q&A, Wrap-up, Adjourn	2:00 - 3:00

Week 2 – 7: Expert-led Webinars

Week	Date	Topic	Time
2	Wednesday, October 9	21 Coverage Gaps	11:00 ET
3	Wednesday, October 16	How to Get Past the Gatekeeper to the Decision-Maker	11:00 ET
4	Wednesday, October 23	Productivity & Time Management	11:00 ET
5	Wednesday, October 30	Synergistic Relationships with Your Carriers	11:00 ET
6	Wednesday, November 6	Risk Management 101 – the Basics	11:00 ET
7	Wednesday, November 13	Visioning & Goal-setting	11:00 ET

Week 8: Classroom

Philadelphia, PA | November 20-21

Day 1, Nov. 20	Time
Breakfast and Networking	8:00 – 8:30
Individual Progress Reports	8:30 – 9:00
Cracking the Code to Commoditization	9:00 – 10:30
Break	10:30 -10:45
14 Strategies to Implement Risk Management Solutions	10:45 – 11:15
New Business Hit Ratio	11:15 – 12:00
Lunch	12:00 – 1:00
Prospect Criteria Filter	1:00 – 2:00
Research on Brand Differentiation & Customer Experience Journey	2:00 – 3:00
Risk Management Presentation	3:00 – 4:30

Day 2, Nov. 21	Time
Breakfast, Networking, and Takeaways from Day 1	8:00 – 8:30
Building Relationships that Last	8:30 – 10:00
Handling Objections	10:00 – 11:00
Break	11:00 – 11:15
The Art of Negotiation	11:15 – 12:15
Lunch	12:15 – 1:15
Conducting a Stewardship Review	1:15 – 1:45
Goodbye Agent-Broker, Hello Outsourced Risk Manager	1:45 – 2:30
Key Takeaways and Graduation	2:30 – 3:00