

# Goodbye Agent & Broker...

## **Hello Risk Manager.**

A game-changing, one-week, digital experience.



**BEYOND  
INSURANCE**

# Goodbye Agent & Broker...**Hello Risk Manager.**

## The Challenge

The evidence is overwhelming. Today's consumer is demanding that you step up your game and serve them as a chief risk officer would. They are searching for a disciplined approach, planning process and service standards...a customer experience...that differ significantly from the traditional agent or broker. And, most importantly, they expect you to begin each engagement with a blueprint focused on the identification, evaluation, and measurement of risk — an enterprise-wide, diagnostic risk management evaluation.

## The Solution

To hit this challenge head on you must know your WHY! You must be able to answer questions such as:

- What gives meaning to my work?
- What inspires me to act?

If you are not crystal clear about your WHY... your cause...and desire a consultative and diagnostic Enterprise Risk Management (ERM) platform to win and retain business, ***Goodbye Agent & Broker, Hello Risk Manager*** is for you.

The engaging program offers training and coaching in consultative and diagnostic sales using a 5-step enterprise risk management platform.

## Who Should Participate

This course is designed for seasoned and successful agents and brokers who want to take their game to the next level — to reap the rewards that only credibility, trust and enhanced perception can bring. Although at least two years of industry experience is recommended, consideration will be given to professional experience outside the industry.

## Key Benefits

Formal training in consultative, diagnostic and risk advisory skills will give you a distinguished brand and competitive advantage in the marketplace. You will learn how to:

- Discover your WHY
- Shift to a growth mindset
- Utilize a risk decision matrix
- Listen to the voice of the customer
- Execute the 5-step Risk Management Method





A close-up portrait of a middle-aged man with a light beard and mustache, wearing black-rimmed glasses and a light blue button-down shirt. He is smiling slightly and looking directly at the camera. The background is a soft, out-of-focus grey.

“A powerful enterprise risk management approach that **transformed the way I do business.**”

## Virtual Learning Platform

The collaborative learning platform will empower you to master the methods of thinking like a risk manager in just 30 minutes a day over one week.

- Access the course anywhere, any time on any device.
- Interact online with a community of peers and experts in robust discussion groups.
- Enhance your learning through expert videos, case studies, articles and thought-provoking exercises.

## Course Outline

Topics to be covered during the program include:

- Developing a growth mindset
- Discovering your “WHY” — your purpose for existence
- Recognizing traps that impact growth
- Developing your unique message — your trusted risk manager proposition
- Mastering the 5-Step Risk Management Method
- Applying the Risk Decision Matrix within the ERM framework
- Implementing key takeaways, tools and tactics

## Meet the Experts

### PERFORMANCE COACHES



#### Scott Addis

Scott Addis, CPCU, CRA, CBWA, TRA, is the founder and CEO of Beyond Insurance. He is recognized as an industry thought leader, sought-after speaker and author of *Summit...Reach Your Peak and Elevate Your Customer's Experience*. He has been published extensively in *Rough Notes* magazine *Forbes*, *Insurance*, *CEO*, *Sales and Service Excellence* and the *PIA* magazines.



#### Matt O'Neill

Matt O'Neill, CRA, CBWA, ACRA, TRA, Chief Experience Officer of Beyond Insurance, supports independent agencies and large national carriers to maximize their implementation of Beyond Insurance tools, tactics, processes and programs. Matt is a Master Coach for the Beyond Insurance Global Network and the firm's other key training programs.

### MODERATOR



#### Carolyn Smith

Carolyn Smith, TRA, serves as Director of Curriculum Development for Beyond Insurance and leads strategy and execution for new program development. Carolyn has led marketing and communications for the National Alliance for Insurance Education and consulted in the US and internationally on branding and marketing.

## REGISTRATION AND FEE

The course fee is \$399. Space is limited for open seating courses. Check dates and availability online. Private groups are also available exclusively for your agency and teams.

Find out more and register now at [beyondinsurance.com/goodbyeagent](https://beyondinsurance.com/goodbyeagent)

## About Beyond Insurance

Beyond Insurance helps insurance and risk management professionals capture their unrealized potential by providing on-site training, virtual learning, coaching and other educational programs. Independent agencies can also join the Beyond Insurance Global Network™, an exclusive peer-to-peer, membership group with access to diagnostic tools, technology, processes, rigorous training and a community of international thought leaders. Beyond Insurance is headquartered outside of Philadelphia, PA, with team members and programs across the country.



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