

Benefits Job Shadow

Steps

- Review and discuss the call plan prior to each meeting including reviewing any presentation material.
- Observe 1 initial meeting and 1 closing meeting
- Discuss how you can recognize opportunities to refer clients and prospects to Employee Benefits or involve them with a client or prospect

Employee Benefits Materials

- Medical insurance
- Dental insurance
- Vision insurance
- Disability insurance
- Life/voluntary life
- Tax advantage accounts
- ERISA
- HIPAA
- Cobra
- Self-funded medical insurance
- Medical tourism
- Health and wellness management
- HR consulting

Questions

- How do you recognize and refer opportunities for Employee Benefits?
- What do you see as the greatest challenges of cross-selling Employee Benefits to your prospects and clients?
- How will you avoid or address these challenges?
- What is Health and Wellness Management?
- How can Health and Wellness Management add value for your prospects and clients?
- What services does HR Consulting include?
- How can HR Consulting add value for your prospects and clients?