Benefits Producer Learning Path at-a Glance

**Getting Started**

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| **Pre-Start** | **Orientation** |
| 1. Licensing | 1. Human Resources 2. Agency Overview 3. Office Set-Up, Phones and Security |

**Week 1: Sales and Industry Overview**

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| **Day 1** | **Day 2** | **Day 3** | **Day 4** | **Day 5** |
| 1. LP Start Up Meeting 2. Sales Process Overview 3. Insurance Industry | 1. Setting Expections 2. Business Etiquette 3. Producer Ethics | 1. Accounting 2. Medical Insurance Overview | 1. Pipeline Planning 2. Building a Prospect List 3. Gathering Prospect Background | 1. **Week 1 Review** |

**Week 2: Setting Appointments**

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| **Day 1** | **Day 2** | **Day 3** | **Day 4** | **Day 5** |
| 1. Setting Appointments |  | 1. Marketing 2. Department Overviews | 1. Disability EAP 2. Life/Voluntary Life | 1. Initial Presentation Planning 2. Review Past Presentations 3. **Week 2 Review** |

**Week 3: Initial Presentation and Networking**

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| **Day 1** | **Day 2** | **Day 3** | **Day 4** | **Day 5** |
| 1. Observe Initial Presentations |  | 1. Creating a Networking Plan 2. Licensing and Licensing Compliance 3. Individual Medical Overview | 1. Dental Insuance 2. Tax Advantage Accounts | 1. Vision Plans 2. **Week 3 Review** |

**Week 4: Health Care**

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| **Day 1** | **Day 2** | **Day 3** | **Day 4** | **Day 5** |
| 1. ERISA Training 2. Consumer Driven Health Plans (CDHP) | 1. Assist Initial Presentations |  | 1. PPACA Training | 1. Small Group Medical Carrier Meetings 2. **Week 4 Review** |

**Month 2: Planning and Coverages**

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| **Week 5** | **Week 6** | **Week 7** | **Week 8** |
| 1. Medical and TPA Meetings 2. Closing Call Planning 3. Observe Closing Calls 4. Broker/Agent of Record Letter 5. Principles of Underwriting 6. Target Account End to End Coaching 1 7. **Week 5 Review** | 1. Cobra, State, Continuation and HIPPA 2. Health Advocate/ Telemedicine 3. Health and Wellness Management 4. Submissions Training 5. Lead Initial Presentations 6. Milliman Service Detail and Positioning 7. Carrier Quotation Review 8. **Week 6 Review** | 1. Marketing Job Shadow 2. Claims Job Shadow 3. Prospecting Day 4. Proposal Development 5. **Week 7 Review** | 1. Underwriting Job Shadow 2. New Business Implementation 3. Human Resource Consulting Overview 4. Broker Selection Process 5. Leading Information Gathering Meeting 6. **Week 8 Review** |

**Month 3: Stewardship and Renewals**

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| **Week 9** | **Week 10** | **Week 11** | **Week 12** |
| 1. Account Executive Job Shadow 2. Health Management/ Wellness Ride Along 3. Medical Tourism | 1. Pipeline Review 2. Client Pre-Renewal Meeting 3. Business Development Plan 4. Long Term Care Overview 5. Worksite Benefits | 1. Target Account End to End Coaching 2 2. Closing Call Preparation 3. Assist Closing Calls 4. Client Policy Delivery 5. Client Stewardship Meeting | 1. Client Strategic Planning 2. **Month 3 Review** |

**Quarter 2**

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| **Month 4** | **Month 5** | **Month 6** |
| 1. Self-Funding Overview 2. Consulting Fees 3. **Month 4 Review** | 1. Stop Loss Carrier Meetings 2. Assurex 3. P&C Ride Along 4. Cross-Selling 5. **Month 5 Review** | 1. Book Management 2. Lead Closing Calls 3. **Month 6 Review** |