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
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**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**
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**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**
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**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**
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**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**
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**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**
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**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**
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**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**
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