Q4i INTELLIGENCE

PLATINUM ADVISORS SUMMIT

An emergent growth experience built for benefits professionals by benefits professionals.

A program offered exclusively for the members of NABIP

Shaping the *future* of healthcare

Bringing together high-performing advisors to leverage their ability to make one another even stronger.

Platinum Advisors Summit (PAS)

The benefits and insurance industry has never been more demanding. From the increasingly complex and ever-expanding needs of your clients to the typical demands of running a business in the current market, your job of growing your business has never been more challenging. You don't need to take it on alone.

The PAS brings together benefits and insurance professionals facing similar challenges and goals. We will leverage the cohort's experience, successes, and even failures to put everyone on a more predictable path to new levels of success.

Qualifications and expectations

TO QUALIFY

First-year applicants to PAS must be active members of NABIP and be LPRT-qualified or at least commit to applying for LPRT qualification.

Subsequent year applicants must continue to be active members of NABIP, apply for LPRT certification, and have been an active and engaged member of the PAS cohort.

EXPECTATIONS

You will be expected to:

- Set specific and quantifiable goals to be achieved during the PAS year.
- Attend each of the four meetings during the year.
- Show up prepared with all assignments completed.
- Be an active and engaged participant in conversations.
- Share your goals and report on your progress to the rest of the cohort.

Structure

COHORT

You will be placed in a cohort with other high-performing advisors. The cohort size will vary but is targeted to include between 15 and 25 participants.

MEETING CADENCE

We will meet four times a year: two times in person and two times virtually. The in-person meetings will be coordinated with Capitol Conference and National Convention. The virtual meetings will take place in the Spring and in September, before the crush of 4th quarter. (Timing/locations subject to change.)

Each meeting will be a daylong session and combine learning, sharing, networking, and personal accountability.

75% of the meetings will be committed to the learning, sharing, and networking around pre-determined topics. The PAS facilitator/coach will deliver a topic-specific lesson and then facilitate a conversation among the cohort.

The balance of each session will focus on individual progress reports from the participants based on a structured outline. Depending on the size of the cohort, we will break into smaller groups for this portion of the meeting.

CURRICULUM

The cohort will largely influence the curriculum and will focus on the primary challenges, opportunities, skills, and knowledge necessary in today's employee benefits market. A typical agenda will focus on issues such as:

- Prospecting
- Time management
- Stewardship
- Technology
- Industry trends
- Key Performance Indicators
- Effective selling
- Solutions for clients
- Transparency
- Personal marketing
- Annual planning
- Managing your current book
- Presentation skills
- Communication
- Closing the deal
- Cost control ideas
- New revenue streams
- Open gym discussions

About us

YOUR COACHES

Your facilitators/coaches will be Kevin Trokey and Wendy Keneipp, partners and coaches of Q4intelligence. Q4i, for short, is a business coaching firm committed exclusively to transforming and serving the employee benefits industry.

Kevin became a member of NABIP 30 years ago and has served the association in many roles. He currently serves as the national chair of the Diversity, Equity, and Inclusion committee, recently led the name change task force, and has served as national membership chair and past president for his local and state chapters.

Prior to coaching and training hundreds of benefits producers through Q4i over the past 13 years, Kevin spent 17 years as an employee benefits producer and agency owner/leader.

Wendy is a two-time business owner who has spent most of her career helping businesses and salespeople shape their strategies and communication to effectively connect with buyers. Recognizing how dramatically communication has changed and continues to evolve, she helps salespeople emphasize their strengths to attract good-fit buyers who benefit from their expertise and style of working.

Q4INTELLIGENCE

Q4intelligence serves the benefits industry with business coaching, sales training, and marketing consulting to help agencies and solution providers reach their potential.

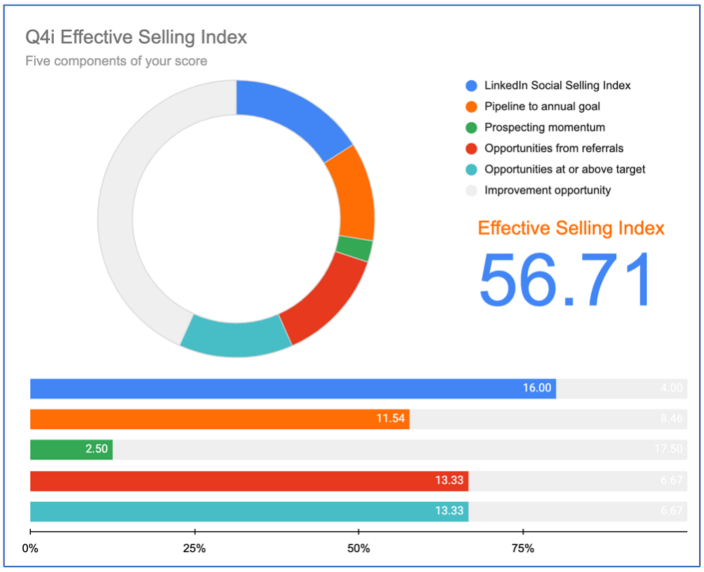
Q4i appreciates that agencies and producers struggle to remain relevant in today's changing environment and to meet the increasingly complex needs of those who depend on their guidance. Q4i's Growth Platform™ provides the framework to help agencies become their clients' most significant and influential partners.

Not only have they helped countless others like you, but they've also been you! They've come from and worked in independent agencies and have experienced first-hand the struggles of running an agency and being a producer.

Sample Resources

Q4I-EFFECTIVE SELLING INDEX (Q4I-ESI)

To track improvement during the program, we will determine and monitor your Q4i-ESI.



The Q4I-ESI provides producers with an objective measurement to determine how well-positioned they are to find sales success. While it does allow for comparisons between producers, it is primarily intended to establish a personal baseline for producers and highlight opportunities to better position themselves for revenue growth.

The Q4i-ESI has five key measures: LinkedIn Social Selling Index, Pipeline to Annual Goal, Prospecting Momentum, Opportunities from Referrals, and Opportunities at or Above Target.

PRODUCER TRANSFORMATION TRACKER (PTT)

The PTT is a planning and accountability tool you will use throughout your engagement with PAS. It will help you capture and track the critical factors determining your success and growth.

- Vision of your biz in 3 years
- Value Proposition
- "How I Sell"
- Priority Activities
- Effective Selling Index
- Your WHY/Purpose
- Ideal Client
- Personal Brand
- Annual Goals
- Monthly planning/accountability

Investment

Participants commit to Platinum Advisors Summit for one-year program engagements. The annual cost of participation is $1,950* (payable quarterly). If the participant withdraws for any reason, the balance of their annual fee is payable immediately.

Participant is responsible for all travel-related expenses for the two in-person sessions.

* Although not expected, it is possible there will be a participation fee for the two live sessions. This fee would be limited to a pro-rata portion of room rental, AV, and and meals.

Evidence of ROI with Q4I

“I don’t remember the last time I was so confident in the future of my business! I made this investment in myself so I could feel this way again. Thank you!”

“I’ve been in this business a long time and this program has been a great refresher for me. I’m not a great teacher, so this has also been a great opportunity to help me train my team!”

“I am already getting great value out of the program. I don’t remember the last time my pipeline was so healthy!”

“This program has stretched me more than I have stretched myself in years–years! And I have only been in this game less than two months. The little wins these past weeks have been huge for me. I finally have a feeling of accomplishment that has been long overdue. Thank you.”

“This program has exceeded my expectations! I’ve been able to eliminate my discomfort when asking for referrals, and I’ve found the ability to collaborate with my peers to be a valuable and rare experience.”