

Group Benefits Sales Academy

Sample Academy Structure

Course Catalogue & Commercial Overview

Practical sales training that improves real group benefits sales conversations.



01

Prospecting



02

Discovery



03

Positioning



04

Closing



Built for MGAs, insurers, agencies,
advisors and distribution teams.



Proven Frameworks.
Stronger Outcomes.

Deployment, Evidence & Training Assets

Built for implementation, inspection, and real field application.



01 90-Day Advisor Activation

- Structured launch rhythm and milestone plan
- Activity baseline and tracking framework
- Cleaner pipeline review structure
- Manager visibility and engagement cadence
- Quote-readiness checkpoints
- Field assignments and practice completed
- Final review of activity, gaps, and next steps



02 Manager Coaching & Scorecards

- Real-time visibility into advisor activity
- Inspection of pipeline and sales conversations
- Practice review and skill reinforcement
- Scorecards and follow-up structure



03 Enterprise-Ready Assets

- Facilitator guides with session plans
- Rollout tools and communication templates
- Certification rubrics and skill checklists
- Workbook sets and reference materials
- Deployment resources for scale and consistency



Designed to turn sales training into visible field execution.



Proven Frameworks.
Stronger Outcomes.

Six-Course Academy Pathway

A structured commercial training system for group benefits sales teams.



01 The Reality of Selling Group Benefits

Navigate complexity, create value, and win trust.



02 Prospecting & Pipeline Creation

Build a steady flow of opportunities.



03 Discovery & Quote Request Control

Ask better questions. Build stronger relationships.



04 Technical Selling

Lead with insight. Protect value. Design with confidence.



05 Presenting / Closing

Lead the conversation. Drive confident decisions.



06 Implementation / Renewal

Deliver value. Strengthen relationships. Grow for the long term.



What participants work through



Workbook Activities

Practical exercises reinforce key concepts and build skills.



Field Assignments

Real-world tasks apply learning to current opportunities.



Manager Visibility Checkpoints

Built-in milestones ensure progress and alignment.



Completion Evidence

Documented proof of learning and application.



Practical Sales Application

Tools and frameworks used in real sales conversations.



Built for MGAs, insurers, agencies, advisors and distribution teams.



Proven Frameworks. Stronger Outcomes.