



2021 WEEKDAYS WITH BERNIE

BERNIEPORTAL TRAINING

Day 1: May 19 Training

8:30 am - 9:00 am	Welcome and Introductions
9:00 am - 9:15 am	What an Employee Sees
9:15 am - 10:45 am	Communicating Eligibility-With or Without an Integration
10:45 am - 11:30 am	Process for an Employer Build-Out
11:30 am - 12:30 pm	1. Broker: Positioning with Prospects 2. Service: Completing Build-Out Forms and Subgroups 101
12:30 pm - 1:30 pm	Lunch
1:30 pm - 2:00 pm	Employee Meetings
2:00 pm - 3:00 pm	Using BerniePortal to Inspire Increased Loyalty
3:00 pm - 4:00 pm	1. Broker: Positioning with Clients in Competitive Situations 2. Service: Build-Out a Demo Group
4:00 pm - 5:00 pm	No Cost / Low Cost Integrations with BerniePortal
6:00 pm - 8:00 pm	Welcome Reception

Day 2: May 20 Breakouts

11:00 am - 12:00 pm	Breaking Down Career Paths and Compensation Levels at Your Brokerages
2:30 pm - 3:30 pm	Build Better Benefits: How You Can Help Clients Develop More Competitive Benefits Packages

Day 3: May 21 Breakouts

11:00 am - 12:00 pm	How BerniePortal Can Help You Reposition the Value You Offer Clients
2:30 pm - 3:30 pm	Using BerniePortal to Drive Growth in Your Prospect Pipeline