



# MasterMind Partnership Program Overview

## The Purpose

The NextGen Benefits Mastermind Partnership was created to provide a structured, highly efficient and effective way to deliver and develop innovative strategies, tools, and resources designed to help employee benefits firms achieve four key objectives:

- **Remain Relevant**
- **Increase Profitability**
- **Stay Independent**
- **Maximize Growth**

**PLEASE NOTE:** This program is not for every firm. The program requires a willingness to collaborate and share best practices with other non-competing agency leaders.

If you are not comfortable sharing your firm's challenges, failures, and successes, *then this program definitely is not for you.*

## Program Outcomes

Since the NextGen Benefits Mastermind Partnership's conception over four years ago, there have been numerous successes achieved by all of the Mastermind Partners.

- **The Olson Group** experienced 74% organic growth over three years. President Tim Olson was recognized as EBA magazine's Employee Benefit Adviser of the Year in 2015.
- **Group Services, Inc.** over two years doubled its EBITDA while moving to a fee model, streamlining its management structure, and adding a full-time marketing coordinator.
- **Becker Benefit Group** moved to a consultative process built on fees & performance-based compensation while also building a complementary new business, ScriptSourcing.
- **Corporate Benefit Analysts** reduced overhead while at the same creating a more streamlined workflow, establishing an industry advisory council, and investing in an outsourced marketing & lead-generation program, which is consistently producing quality meetings.

- **Heavin & Associates** successfully moved into the individual retail side of the market adding over 2,000 individual clients in just three years, while still maintaining a healthy book of group business.
- **ENERGI** created a ton of media exposure in support of the principal, Craig Lack, including an *Inc. Magazine* feature that described him as “the most effective consultant you’ve never heard of.” Simultaneously, Lack has built a high-level, robust cost-reduction program for large companies and continues to share it across the country.
- **Principal Resource Group** developed a new healthy revenue stream by leveraging an existing retirement client while also developing more visibility in a highly competitive marketplace.

Naturally, results will vary and we make no guarantees about your firm’s success or experience. We simply don’t know how well you will implement what you discover from your collaboration with your peers. That said, you will not be at a loss for expertise and access to worthwhile strategies, tools, resources, and valuable experience from your peers.

## The Program

The NextGen Benefits Mastermind Partnership includes a variety of components, as outlined here:

**Three 2-Day Elite Mastermind Summits** These events are the core of the Mastermind Partnership. During these intensive Summits, the Mastermind Partners will gather to share best practices, collaborate and innovate new approaches, discover new strategies & tactics, and learn about new tools and resources. Through expert presentations, “show & tell” from the group, the occasional field trip, and focused masterminding, the group is empowered and held accountable to grow their firms and achieve their goals.

**Four Quarterly Growth Consulting Sessions** In addition to the three Mastermind Summits, you’ll also benefit from quarterly growth consulting calls with Nelson Griswold. These sessions are carefully structured to give you specific guidance and recommendations to propel forward to your goals. At the same time, these calls will help hold you accountable to ensure you are consistently moving closer to those goals.

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**30-Day Check-Ins** Every month, we’ll conduct a quick 30-day check-in with you. This includes your completion of a simple online form accounting for your progress and/or challenges. These results will be reviewed by Nelson and Scott and any relevant guidance or course correction will be provided to ensure you stay on track toward achieving your key goals.

**VIP Registration for ASCEND** As a Mastermind Partner, you’ll receive complimentary VIP access to ASCEND – The Agency Growth & Leadership Summit, a \$1500 value. Your VIP registration entitles you to not only all of the stellar, business-building programming, but also access to the VIP Lounge, exclusive reception, and much more.

**Membership in the Association for Insurance Leadership** Included in your membership benefits, you will receive access to The Agency Insider. This online program is your window into some of the most transformational benefits agencies in the country. With monthly Executive Leadership interviews of top benefit firm leaders, you’ll discover the strategies and methods behind their success. Additionally, you’ll receive a bi-weekly brief NextGen Benefits Video designed to focus on a specific method, tactic, or tool to help you grow your benefit practice. Think of this program as a consistent flow of proven methods and motivation.

**Access to the ASCEND Archived Presentations** Besides being a VIP at ASCEND, you'll also receive access to the ASCEND Archive of the ASCEND general session video recordings. This will let you go back and listen to the sessions again or share them with your team members.

**Email Access to Nelson Griswold for Consulting** Perhaps one of the most valuable aspects of the Mastermind Partnership is the access you have to Nelson Griswold via email. With so many Mastermind Partners, Nelson simply cannot always be available for a call, but he is accessible via email – ready with their recommendations, insight, and encouragement.

**Mastermind Update Emails & Briefings** Every so often, you'll receive a Mastermind Update email or briefing. Sometimes, these emails are simply important announcements about the group or logistical information, but often they will include valuable tools, resources, and/or information to help you move your firm closer to your goals.

**Online Mastermind Partnership Portal** Mastermind Partners receive special access to their own online portal where Summit videos, tools, presentations, resources, etc. are all available to them in one place. There is also a group forum as well where members can easily communicate with one another, ask questions, and share strategies.

**miEdge State License** Because we believe so much in the value of miEdge, as a Mastermind Partner you receive a complimentary license for your state. miEdge allows you and your team to easily accomplish a variety of valuable growth activities including: in-depth competitive research, prospect identification and research, determination of strategic partnership opportunities, and more.

**Exclusive Mastermind Resources & Discounts** As a Mastermind Partner, you'll also be entitled to a variety of resources made available as well as valuable cost reductions and discounts with other Bottom Line Solutions programming and from other strategic partners.





## The Investment

Once your firm is invited to join the NextGen Benefits Mastermind Partnership, the investment to participate is \$20,000 per year, or \$1,666 monthly. Your participation requires an initial 12-month commitment. The investment is paid monthly via credit card. If you prefer to make a single payment for the first year, a company check is required.

After the initial 12 months, your participation will continue automatically at \$1,667 monthly. If you decide to leave the group, you may do so after submitting a 90-day written advance notice of your intention to leave.

## The First Step: Diagnostic Evaluation

As a first step to joining the NexGen Benefits Mastermind Partnership, a Diagnostic Evaluation will be conducted for your firm. This is a simple, highly valuable evaluation process conducted personally by Nelson Griswold. Upon completion of the Diagnostic, you'll be given a detailed NexGen Benefits Mastermind Profile report that will lay out specific strategies and action steps to help you grow your firm.

After that, you will be ideally positioned to realize the greatest value from your time with your peers in the NexGen Benefits Mastermind Partnership.



*I came to the Mastermind Partnership looking for agency collaboration, honest feedback, and accountability to execute on our vision. I got all three.*



**Pete Scruggs**, President  
Golsan Scruggs  
Battleground, WA

**Contact Kyndall McDorman to Get Started!**

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