

NextGen Benefits Boot Camp Basic Training

It's Time.

Upgrade Your Expertise and Capabilities with NextGen Benefits.

Experience the refreshing new model that delivers a radically different approach to healthcare.

Break free from the BUCAs and **empower C-Suites** to take control of their health spend, reduce health care costs (*in the first year!*) and drastically improve the quality of care.

Reclaim Your Value

Employee benefits has become an exercise in serial failure that has drained the enjoyment & fulfillment from the business. *You love what you do right?*

Unfortunately, the failures of the current approach are making it nearly impossible to have that passion anymore - **and none of it is your fault.**

High out-of-pockets, unsustainable cost trends and ridiculous rate increases are not on the adviser. It's the broken status quo model.

NextGen Benefits is radically changing all of this.

NextGen Benefits Bootcamp is a **no-frills, intensive workshop** to get your agency into NextGen shape quickly and with a lot less effort.

Here's the game plan & what to expect:

- Designed for both advisers new to NextGen Benefits and those advisers ready to sharpen their NextGen TOOLSET | SKILLSET | MINDSET for faster results.
- Limited number of qualified attendees for intimate training of like-minded benefits professionals.
- Built in an immersive environment to learn, design and implement the essential strategies for NextGen benefits
- Developed with tactical processes and plans for successful implementation
- Made for a deep-dive into the actual techniques (no mere theory), with a step-by-step curriculum taken straight from the advisers selling NextGen in the C-Suite **now**.
- Supported by curated content from the best-sellers *Breaking Through the Status Quo*, *NextGeneration Healthcare*, and *Life & Death Decisions in the C-Suite*, as well as *The CEO's Guide to Restoring the American Dream*.

You also receive a Boot Camp workbook and an extensive set of ready-to-run templates to expedite the implementation for your firm.

CURRICULUM

Master the C-Suite Conversation

NextGen Benefits Principle *NextGen Benefits is a strategic, financial conversation that belongs in the C-Suite. NextGen Benefits strategies require the buy-in and support of the CEO and/or CFO, i.e., an executive with the strategic decision-making authority and P&L responsibility that HR lacks.*

Key learning points:

- who is in the C-Suite;
- the motivations, wants, needs & buying habits of the CEO and CFO and how they differ;
- the C-Suite mindset and how it differs from HR;
- the key terms and phrases – and how and when to use them – that establish you as a business consultant and not a broker;
- the latest strategies for positioning yourself & presenting to the C-Suite;
- how to pivot from HR to the C-Suite without alienating HR.

Move to Fees & Performance-Based Compensation

NextGen Benefits Principle *Compensation transparency and fee-based compensation establish trust by aligning the adviser's interests with the employer client.*

Key learning points:

- how to have the conversation with the client to move from commissions to a fee-for-service model, when it's possible;
- how fees align your incentives with the client in multiple ways and why that is so important in NextGen Benefits;
- how to set and justify your fees;
- how showing employers who you work for, how you get paid, and what you get paid to build the trust that makes you the “trusted adviser”;
- the role of performance-based fees in NextGen Benefits.

Build Your NextGen Benefits Solutions Toolbox & Team

NextGen Benefits Principle *Alternative funding with an independent, unbundled TPA allows management of the health care supply chain to ensure quality and lower the cost of health care.*

Key learning points:

- deconstructing a fully insured health care plan;
- the NextGen Benefits strategies and tactics you need in your toolbox;
- which solution providers you need on your team;
- how to vet solution providers to ensure you have the right team;
- the 4 questions you ask to balance the PEPY/Noise teeter totter;
- the roles and responsibilities of a NextGen Benefits Adviser.

CURRICULUM

Move from Broker to Adviser

NextGen Benefits Principle *NextGen Benefits requires consultative advisers who can identify prospects' wants and pain points and use NextGen Benefits to solve their problems and provide them with what they want.*

Key learning points:

- the key difference between a broker and an adviser;
- how a consultative approach separates you from transactional brokers and establishes you in the C-Suite as a business consultant;
- the power of questions in the consultative process;
- the key consultative questions that identify what your prospects really want, engage –their emotions, and position your solution as the answer they're looking for;
- Ninja-like communication techniques that reduce prospect resistance and objections to dramatically increase your sales success.

Learn Alternative-Funding Essentials

NextGen Benefits Principle *Disintermediating the BUCAH carrier to replace a fully insured plan with an alternative funding model for the employer's health plan is essential to gaining control of the health care budget and plan design. When paired with an independent NextGen third-party administrator (TPA), this control allows for management of the health care supply chain to ensure high-quality care and lower costs.*

Key learning points:

- why self-funding poses no more financial risk than a fully insured plan;
- how self-funding is necessary, but not sufficient, to control health care costs;
- why all level-funded plans are not created the same;
- the key characteristics of best-of-breed NextGen level-funded plans;
- best-practice ways to explain self-funding to employers.

QUICK START: Implementing NextGen Benefits

With the proper expectations, the correct strategy, and the right Toolset, Boot Camp graduates can and *should* begin to present NextGen Benefits to business owners and C-Suite executives as soon as the first business day after basic training ends. Moreover, when a prospect conversation produces a "Yes," Boot Camp graduates are equipped to choose and implement the right NextGen plan.

Key learning points:

- the value of an incremental approach to implementing NextGen strategies;
- your best immediate prospects for introducing NextGen Benefits;
- talk track to pivot safely from your existing HR relationship to the C-Suite;
- the specific words & terms from the C-Suite Lexicon to use to sell the C-Suite;
- the NextGen Easy Button that makes implementing NextGen easy & almost risk-free.

FACULTY



NELSON GRISWOLD

Chairman
NextGen Benefits

Instructor

Nelson Griswold is the leading architect of NextGen Benefits, which was named "Most Influential Industry Organization" in an industry-wide vote for its work disrupting the healthcare and employee benefits industries.

In recognition of Nelson's impact on the healthcare industry, *CEO Today* magazine named him a 2022 *Healthcare Awards Finalist*. He also was named a Finalist for the 2018 *Health Value Awards – Outstanding Consultant Leadership* at the World Health Care Congress and was honored with the prestigious *Industry Leadership Award* by the Voluntary Benefits Association. In 2022, Nelson spent a week as the guest of legendary entrepreneur Sir Richard Branson at an exclusive, invitation-only retreat for "disruptive entrepreneurs" on Branson's private island in the British Virgin Islands.

He is Founder and Chairman of the exclusive NextGen Benefits Mastermind Partnership, a national executive peer-exchange network for agency owners and benefits practice leaders. The Mastermind has produced some of the industry's most elite and recognized advisers, including three honored as *Benefit Adviser of the Year, a Broker of the Year*, and six named *Broker of the Year Finalists*, as well as a dozen advisers recognized as *Top Women in Benefit Advising* and nine named *Rising Stars in Advising*.

The author of *DO OR DIE - Reinventing Your Benefits Agency for Post-Reform Success*, a trade bestseller for leaders of employee benefits firms, he is lead author of five Amazon bestsellers on private sector healthcare reform. A monthly columnist at *Employee Benefit Adviser* magazine for almost a decade, he currently writes for *Employee Benefit News, BenefitsPRO* and *Entrepreneur*.

Nelson is Founder & Chairman of the ASCEND Agency Growth & Leadership Summit, the national conference for innovative healthcare advisers and health plan innovation, now in its 10th year. He also chairs the Benefits Adviser Leadership Track for the prestigious Health Care Innovation Congress (thINc360) in Washington, D.C.

An authority and popular speaker on private-sector healthcare reform, Nelson has addressed audiences in 44 states and the District of Columbia and has keynoted numerous conferences.

Before he turned his attention to employee benefits and healthcare, Nelson had a distinguished career as a nationally recognized public policy expert, serving as president of two public policy think tanks, lobbying on behalf of his organizations' free-market agenda, testifying before legislative committees, and appearing frequently on national network TV news programs. He also has a background in radio, as host of a morning drive talk show and a popular jazz radio show.