



JOURNEY TO ENROLLMENT

2021 ANNUAL CONFERENCE

January 12-14

2021

WELCOME EMPLOYEES!

TUESDAY

JANUARY 12, 2021

3:00 – 4:15 – Carrier Session 1

- FBA – HSA discussion & Covid-19 changes to FSA's (45 minutes)
- Medical Carrier Presentation (30 minutes)

4:15 – 4:45 – Employer Navigator Intro

5:30 – 8:00 – Dinner & Entertainment

- Recognition and Awards

WEDNESDAY

JANUARY 13, 2021

7:30 - Breakfast

8:00 – 9:30 - Meetings (2 Breakouts)

Sales (Marketing, Enrolling, Consulting, Sales Producers):

- 8:00 – Ameritas (individual dental/vision)
- 8:30 – AFLAC (new products/changes for 2021)
- 9:00 – Oneamerica (sales focus & incentives for 2021)

Service (Account Managers, Selerix Team, etc.):

- 8:00 – FBA
- 8:30 - Trustmark
- 9:00 - Ameritas

9:30 – 9:45 Break

9:45 – 12:00 p.m. – Meetings (2 Breakouts)

Sales (Marketing, Enrolling, Consulting, Sales Producers):

- 9:45 – Trustmark (How to present in 5 minutes or less)
- 10:15 – Community Eye Care – (Why is this better?)
- 10:45 – Baybridge – (Digging deeper in the plan)
- 11:15 – TX Life – Target audience and why.
- 11:45 – Legal Shield or Airmed

Service (Account Managers, Selerix Team, etc.):

- 9:45 – TX Life
- 10:15 – OneAmerica
- 10:45 – AFLAC
- 11:30 – Baybridge

12:00 – Lunch (enrollers leave after lunch)

1:00 – 3:00 – Full Time Employee Session 1

- 1:00 – The 2020 Experience & Looking ahead to 2021
- What changes from 2020 will remain, what is coming.
- 2:00 – The Journey of An Enrollment – Smartsheet Discussion

3:00 – Break (Coffee, etc.)

3:15 – 5:00 - Full Time Employee Session 2

- 3:15 - Building the Core – Health Insurance/FSA/HSA/DE/VI, etc.
- 4:00 – General discussion with Browders - takeaways

6:00 – Dinner (up to 50 attendees)

THURSDAY

JANUARY 14, 2021

7:30 – Breakfast (up to 50)

8:00 – Department Debriefing

- Each dept. present challenges of 2020 & goals for 2021.

10:15 – Break

10:30 – Round Table Discussion

- Break into groups – mix of each dept. Discuss specific topic/problems.
- Present ideas & solutions to the entire group/discuss.

12:00 – Lunch (then go home)!

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