



2019 WEEKDAYS WITH BERNIE BERNIEPORTAL TRAINING

DAY 1: MARCH 25

8:00 am - 9:00 am	Welcome and Introductions
9:00 am - 9:15 am	What an Employee Sees
9:15 am - 10:15 am	Communicating Eligibility – With or Without an Integration
10:15 am - 11:00 am	Process for Employer Build-Out
11:00 am - 12:00 pm	Service Team: Building Out a Demo Group
	Broker Team: Positioning with Prospects
12:00 pm - 12:30 pm	Employee Meetings
12:30 pm - 1:30 pm	Lunch / Planning for Success
1:30 pm - 3:00 pm	Using BerniePortal to Inspire Increased Loyalty
3:00 pm - 4:00 pm	Service Team: Reporting
	Broker Team: Positioning with Current Clients
4:00 pm - 5:00 pm	Adjourn Day 1
6:00 pm - 8:00 pm	Welcome Reception

DAY 2: MARCH 26 BREAKOUTS

11:00 am - 12:00 pm	Five Star Tech-Support
2:30 pm - 3:30 pm	Service Team: Meta-Planning: What's Next for BerniePortal?
	Broker Team (option 1): Meta-Planning: What's Next for BerniePortal?
3:00 pm - 4:00 pm	Broker Team (option 2): Building the Ladder
	Service Team: Mapping Carrier Forms*

DAY 3: MARCH 27 BREAKOUTS

10:30 am - 11:00 am	Service Team: Building the Things That Inspire Loyalty *
2:30 pm - 3:30 pm	Service Team (option 1): Meta-Planning: What's Next for BerniePortal?
	Service Team (option 2): Prospecting for Gold
	Broker Team (option 1): Meta-Planning: What's Next for BerniePortal?
	Broker Team (option 2): Prospecting for Gold

*** Please visit the “Help Desk”**

