



2020 WEEKDAYS WITH BERNIE BERNIEPORTAL TRAINING

DAY 1: MAY 20 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	Service Team: Completing Build-Out Forms and Subgroups 101
	Broker Team: Positioning with Prospects
12:30 pm - 1:30 pm	Lunch
1:30 pm - 2:00 pm	Employee Meetings
2:00 pm - 3:30 pm	Using BerniePortal to Inspire Increased Loyalty
3:00 pm - 4:30 pm	Service Team: Building-Out a Demo Group
	Broker Team: Positioning with Clients in Competitive Situations
4:30 pm - 5:00 pm	No Cost / Low Cost Integrations with BerniePortal
5:15 pm - 6:45 pm	Welcome Reception

DAY 2: MAY 21 BREAKOUTS

11:00 am - Noon	The Road to Meeting 1
2:00 pm - 3:00 pm	Change Management

DAY 3: MAY 22 BREAKOUTS

11:00 am - Noon	Broker Team: Dynamic Between Sales & Service
2:00 pm - 3:00 pm	Meta-Planning: What's Next for BerniePortal?



BERNIEPORTAL

www.WeekdayswithBernie.com