



2024

**Advanced
Sales Forum**

Practice Management Networking Sharing Tools for Success



Thea Marasa-Scafidi

VP, Head of Advanced Markets
Global Atlantic Financial Group



Katherine D. Goldsmith

AVP, Advanced Markets
Western Southern Financial Group



Recruiting and Development

What are some nonnegotiable/required skills? What are some preferred skills/nice to have qualities in a candidate? Do you find any of these particularly difficult to find? Are there any challenges when working with corporate recruiting teams and how have you overcome them?

For individual contributors: what qualities do you believe set you apart in the recruiting process?

*Does your firm have a formal training program?
How do you utilize it to train talent you bring into
your team?*

*For individual contributors: Talk about training in a
new company. Are there any elements you found
particularly helpful or anything you wish had been
implemented in the process?*

We have discussed hiring and training... now let's look at career paths. The Advanced Sales sector of the insurance industry can sometimes feel a bit siloed.

For younger talent that is looking for career development, talk about career paths you have seen for advanced sales professionals both inside and outside the advanced sales space.

How can we best support top talent in their career aspirations and highlight talent in our organizations?

*What is the most important element:
in retaining employees?*

OR

*when considering whether to make a career move
or stay with your current company?*



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No gatekeeping!

What are your go-to resources in your day-to-day?

What do you lean on for research, knowledge bases, favorite websites, favorite blogs, etc?



Fiduciary Responsibilities

What do you see as your fiduciary duty in our day-to-day work?

Do you meet with clients? If so, how do you navigate those conversations?



Headwinds and Tailwinds

What do you see as the biggest impediment to success in the industry?

What do you see as the greatest support to success in the industry?



Measuring Success

How do you quantify your team's value to the powers that be in your organization?

How do you measure success?