2024 Advanced Sales Forum

Practice Management Networking Sharing Tools for Success





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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?







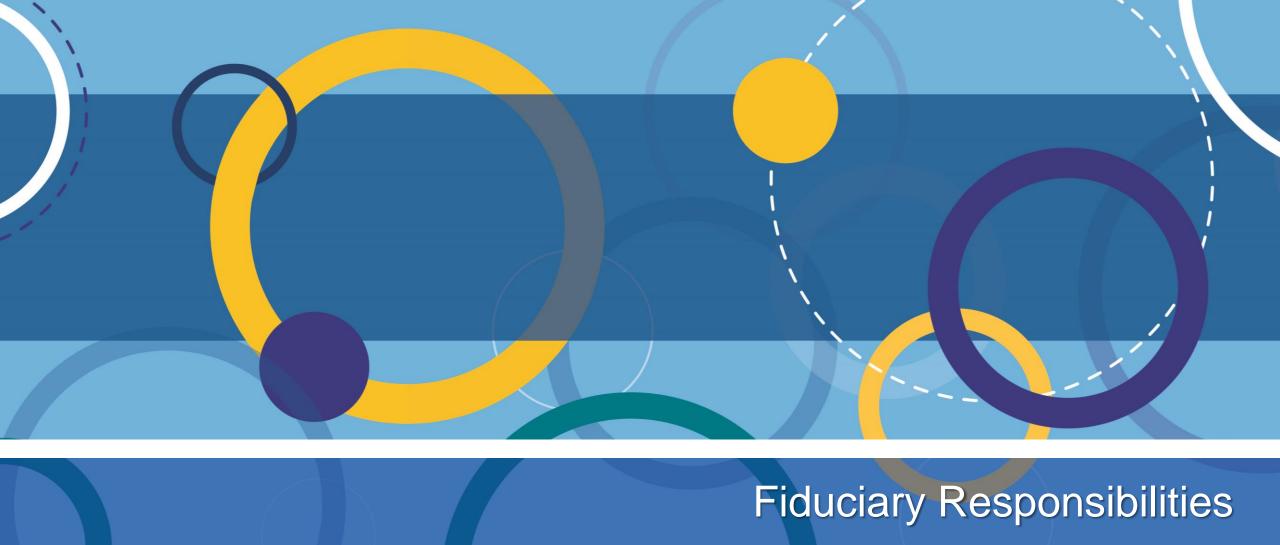
No gatekeeping!

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?







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

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







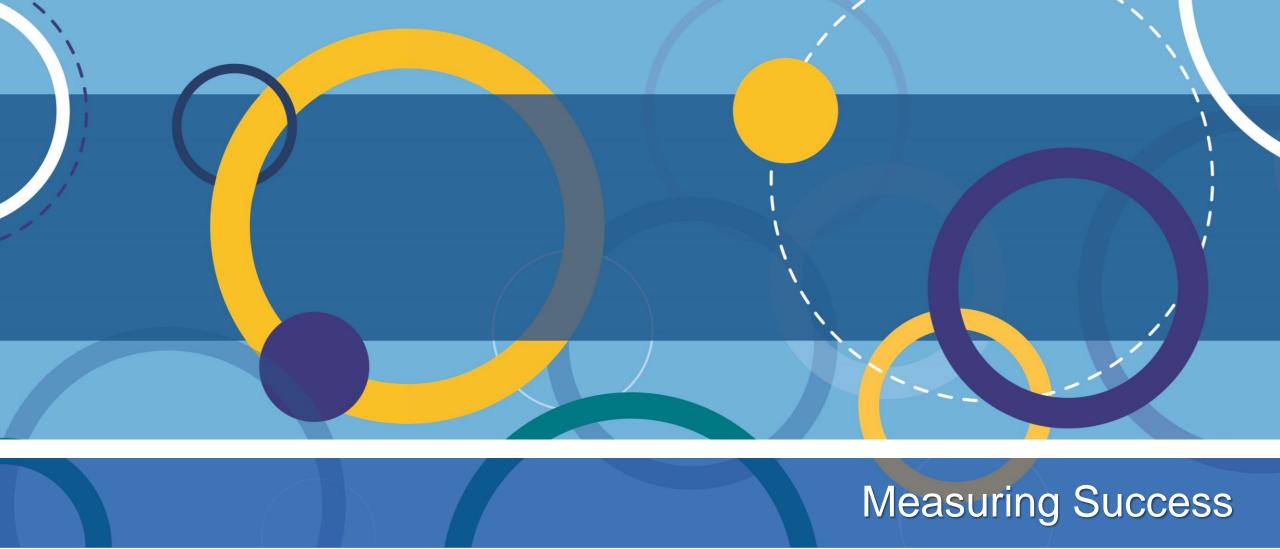


What do you see as the biggest impediment to success in the industry?



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







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



How do you measure success?

