

# Trustworthy Selling® Product Line Pricing and Recommendations- Domestic

For Internal Use Only

## Introduction

The below pricing proposal and guidelines for the Trustworthy Selling® line of products are intended to accomplish three goals:

1. Update pricing for the Trustworthy Selling Enterprise pricing structure in order to make the product more cost effective for our customers to implement, supporting great program adoption and sales (incenting higher sales)
2. Establish pricing for the SkillSet *powered by* Trustworthy Selling product line offering, new to market as of January 2024
3. Establish guidelines for pricing customized solutions utilizing Trustworthy Selling content
4. Establish guidelines for auditing and updating pricing on a regular basis

Each pricing section is presented below, with considerations at the end of this document.

## Enterprise Pricing Schedule for the Trustworthy Selling Full Program:

Enterprise pricing is our best value for customers who wish to use the full Trustworthy Selling program. Enterprise pricing represents a further discount than individual participant pricing (represented in chart below) and is the best value for our customers and will be presented alongside a **2-year usage term**. Customers can choose between the following programs:

### **Trustworthy Selling Full Program** for Captive and Independent Sales Professionals.

10 modules of content delivered over a period of time (26 ½ hours of content) designed to help professionals:

- Improve connections while understanding buyer psychology and behavioral economics
- Adapt selling style to maximize communication flexibility
- Deepen existing client relationships through strategic client management practices
- Increase engagement and build stronger relationships through the art of questioning
- Obtain high quality favorable introductions with confidence
- Integrate the habits of peak performance psychology of top producers

The Full Program is available in two versions:

- Quick Start version for those brand-new to the career
- Professional version for those who have a book of business and have been in the career for 6 months or more

### **Trustworthy Selling MultiLine Full Program** for Captive and Independent P & C Sales Professionals

10 modules of content designed to help property and casualty agents improve their skills and ability to pivot to the life insurance and financial services conversation with prospects and customers. Multiline

agents who can do this successfully and improve their crossline sales ratio are going to experience increased new business, higher retention, and more favorable introductions.

The ML Full Program is available in two versions:

- Quick Start version for those brand-new to the career
- Professional version for those who have a book of business and have been in the career for 6 months or more

The table below lists individual and enterprise pricing.

*Number of Participants	**Total License Fee
Per Participant	\$895 per participant
100	\$59,500
101 to 250	\$123,750
251 to 500	\$225,000
501 to 1,000	\$395,000

Usage volume of 1,001 participants or greater will need to be determined internally prior to offering a price to companies/customers.

*Facilitator Certification and Coach Certification fees apply.*

\*Companies have up to 24 months to use all participant licenses.

\*\*Total License Fee is due upon signed Contract.

Scenarios: Since this is a recommended pricing model, you do have some flexibility with your pricing recommendations.

If someone wants to purchase 100 seats (training 100 participants), this is considered an EL100 license. The licensing fee is \$59,500 or \$595 per seat.

What if someone wants to purchase 125 seats? Do I have to move them up into the next tier and make them buy 250 seats at \$123,750? The answer is no. In this case, it would be wise to allow the member to purchase another 25 seats at \$595 per seat for the total licensing fee of \$74,375.

However, if someone wants to purchase 210 seats, it would be best for them to consider an EL250 license, since the total for 210 seats at \$595 would be more than the EL250 license of \$123,750.

## Pricing Schedule: SkillSet *powered by Trustworthy Selling*

SkillSet *powered by Trustworthy Selling* edition for Captive and Independent Sales Professionals

This one-day course edition is for sales professionals at any stage of their career in our industry who want to sharpen their skills to drive higher productivity. SkillSet helps sales professionals get in front of the right people, build trust quickly, and identify the needs and desires of the potential client through the art of questioning - improving efficiency, effectiveness, and profitability.

Pricing follows our Enterprise pricing model and represents a further discount than individual pricing (represented in chart below) and is the best value for our customers, presented alongside a **2-year usage term**.

*Number of Participants	Cost per Participant	**Total Licensing Fee
Up to 25*	\$495.00	\$12,375
Up to 50*	\$450.00	\$22,500
Up to 75*	\$425.00	\$31,875
Up to 100*		\$39,500
Up to 250*		\$87,500
Up to 500*		\$162,500
Up to 1,000*		\$295,000

Usage volume of 1,001 participants or greater will need to be determined internally prior to offering a price to companies/customers.

\*Companies have up to 24 months to use all participant licenses.

\*\*Total License Fee is due upon signed Contract.

Scenarios: Since this is a recommended pricing model, you do have some flexibility with your pricing recommendations.

People may question why 100 seats under the EL pricing structure for the full program is \$59,500, while 100 seats for SkillSet (technically two modules of the full program) is \$39,500. The answer to this question is simple. SkillSet takes curated content from the full program targeted at delivering an immediate impact in productivity to sales professionals who are looking for training opportunities that will help improve their retention rates and productivity. SkillSet is also extremely easy to implement and easy to execute. No facilitator or coach certification requirements which has associated fees. We do the

heavy lifting for our client companies by providing them with materials that are ready for quick delivery to support immediate impact.

The pricing model for SkillSet has lower pricing bands that are closer together in order to attract “retail” type training opportunities – meaning, smaller agency type organizations that have a group of sales professionals to train. The larger pricing bands are similar to the Enterprise License strategy for the full program. We provide the cost per participant for the smaller bands since most organizations will ask, if I want to train 50 people, how much will it cost per participant?

The same scenarios apply for the SkillSet pricing model as described above for the EL full program pricing model. If someone wants to purchase 125 seats, the best pricing strategy for them would be to sell them 125 seats at 100 seat pricing model – which is \$395 per seat. So the total licensing fee would be \$49,375. However, if they want purchase 225 seats or more, it would be best for them to purchase the 250 band at \$87,500. Again, they have up to two years to use all of the seats.

### Pricing Schedule: Facilitator and Coach Certification

In order to support our client companies with quality program delivery and ongoing application and development of the skills taught in the Trustworthy Selling program, we offer an easy-to-follow Facilitator and Coach Certification path designed to properly prepare your company’s Facilitators and Coaches utilizing the training content.

We **require** your Facilitators and Coaches (if applicable) to successfully complete the certification process to deliver the following program editions:

- Trustworthy Selling Full Program – Quick Start and/or Professional
- Trustworthy Selling MultiLine Full Program – Quick Start and/or Professional
- 4 or more modules from the Modularized edition of the Trustworthy Selling program content

Our certification program provides the following value to our client companies:

1. **Quality Assurance:** Ensures your facilitators meet predetermined standards of proficiency and competence with the delivery of the Trustworthy Selling program content. This quality assurance mechanism guarantees that facilitators possess the necessary understanding and knowledge of the program’s content to lead productive and meaningful sessions.
2. **Professional Development:** Facilitators gain access to resources, tools, and best practices that enhance their effectiveness in guiding groups toward achieving the program’s objectives.
3. **Credibility and Trust:** Certification serves as a stamp of approval, signaling to participants and leaders that the facilitator has undergone rigorous training and evaluation. This builds credibility and trust, leading to increased confidence in the facilitator's ability to deliver results.
4. **Consistency:** Standardized certification processes promote consistency in facilitation practices across different regions, contexts and settings, leading to predictable outcomes and improved participant experiences.
5. **Recognition and Differentiation:** Certified facilitators often enjoy greater recognition and differentiation within your organization.
6. **Risk Mitigation:** Certified facilitators are better equipped to navigate complex group dynamics, conflicts, and challenging situations effectively. Their training and experience enable them to

mitigate risks and ensure that facilitation processes remain focused, productive, and respectful of participants' needs and perspectives.

We do not require Facilitator/Coach Certification for delivery of the following program editions:

- SkillSet powered by Trustworthy Selling
- 3 or less modules from the Modularized edition of the Trustworthy Selling program
- Content that is licensed through a licensing agreement

We do provide Facilitators and Coaches of these editions access to materials that will help prepare them for the delivery and ongoing support through coaching for how to utilize the Trustworthy Selling program content.

The fee structure for Facilitator and Coach Certification follows with information about the certification process and role:

Facilitator Certification and Materials Fee*	Coach Certification and Materials Fee**
\$750.00 per Facilitator	\$195.00 per Coach

\*Facilitator:

*Certification*

As part of the certification, facilitators will be provided with assessments and a self-paced learning curriculum which will prepare them for their certification process. Candidates will participate in a live, virtual demonstration using the materials learned. Optional video demonstrations are also provided.

*Role*

The person(s) who is certified to deliver the Trustworthy Selling class has the role of facilitator. They can be a company trainer or a LIMRA/HPN trainer. The facilitator becomes certified after completing the certification process and receives one Trustworthy Selling Facilitator Kit (facilitator guide, participant guide, one set of wall charts, and one activity sort kit) in one version/one language of the program. The facilitator receives access to one version/one language of the website for 270 days; access starts upon the first onboarding date.

\*\*Coach

*Certification*

Trustworthy Selling involves performance coaching as part of the standard curriculum, and as such requires an assigned coach for each participant. Assigned coaches, if different from the program facilitator, are required to attend Trustworthy Selling as a participant and a self-study eLearning to become certified to coach the Trustworthy Selling curriculum.

*Role*

The person who is responsible for guiding participants and reinforcing concepts through the Trustworthy Selling class has the role of coach. The coach must have participated in the program as a participant and receive one Trustworthy Selling participant guide and one coach's guide in one version/language of the

program. The coach receives access to one version/one language of the website for 210 days. Access starts upon pre-work due date or class start date depending on the delivery model of the class attending. The coach does not need to be certified if this role is being fulfilled by a facilitator. However, if the coach is not a facilitator, the coach becomes certified after completing the coach certification process.

### Pricing Schedule: Master Trainers

Master Trainer certification is applicable to Certified Facilitators who deliver the Trustworthy Selling Full Program or 4 or more modules from the Modularized edition who wish to continue to certify their company’s Facilitators and Coaches.

<b>Master Trainer Certification Fee</b>	<b>\$1,000.00 per Master Trainer</b> (If facilitator certification fee has already been paid, the fee will be the difference between the master trainer fee and the facilitator fee, i.e., \$1,000.00 – \$750.00 = \$250.00)
<b>Coach the Coach Master Trainer Program Fee</b>	<b>TS student fee only</b> (The \$195.00 Coach-the-Coach program fee is waived when a master trainer is delivering the program.)
<b>Facilitator Certification by Master Trainer Fee</b>	<b>\$375.00 per new Facilitator</b>

### Master Trainer Certification

A master trainer candidate must meet the following pre-requisites prior to beginning the master trainer certification process:

- Must be certified as a TS Facilitator to deliver the TS Full Program (Pro, QS, or ML)
- Must have access to the TS Program Website
- Must have successfully delivered the entire TS Program a minimum of three (3) times (NOTE: this has been lowered from 5 deliveries) and received an average rating of 4.5 out of 6.0, with a minimum response rate of 30 percent on the Level 1 course evaluations (completed by students at the end of the Capstone experience and submitted by trainer to info@tsprogram.com)
- Must pass the TS Exam on the TS Program Website (www.tsprogram.com)

Once the pre-requisites are fulfilled, the certification process for master trainers entails participating in a demo session to assess the ability to effectively explain and field student questions appropriately in the classroom.

Master trainers must be recertified every three years or when the TS program is updated, whichever comes first.

*Role*

The person(s) who is certified to train and certify other company trainers to competently deliver the Trustworthy Selling program and to certify field managers to coach participants of the TS Program has the role of master trainer. They can be a company trainer or a LIMRA/HPN trainer. The master trainer becomes certified after completing the certification process and receives all materials necessary to deliver the facilitator and Coach-the-Coach certification sessions. The master trainer receives access to the website for as long as they lead active facilitator, coach, and/or participant groups.

*Custom Solutions:*

The following pricing schedules are offered for our Trustworthy Selling product content as customized solutions. These solutions require a consultative sales approach to really understand the company’s training strategy and determine the best content to meet their organization’s development goals. The Product Managers, [Joey Davenport](#) and [Jacquie Lucas](#), should be part of the sales process to make the appropriate content recommendations and pricing proposals.

Modularized Pricing Schedule:

PROGRAM MODULES			
Understanding Today’s Consumer	Understanding and Adapting Your Selling Style	Business Development Strategies	Engagement Strategies
Collaborative Discovery	Gaining Commitment	Deepening the Client Relationship	Seller Psychology

Up to this # of Participants	Type of Purchase	Total Licensing Fee (All 8 modules)	Total Licensing Fee (Purchase of 4 modules)	Total Licensing Fee (Purchase of 3 modules)	Total Licensing Fee (Purchase of 2 modules)	Total Licensing Fee (Purchase of 1 module)
100		\$75,000	\$45,000	\$37,500	\$30,000	\$22,500
150		\$100,000	\$60,000	\$50,000	\$40,000	\$30,000
250		\$150,000	\$90,000	\$75,000	\$60,000	\$45,000
500		\$250,000	\$150,000	\$125,000	\$100,000	\$75,000

1,000	2 year contract	\$450,000	\$270,000	\$225,000	\$180,000	\$135,000
2,000		\$850,000	\$510,000	\$425,000	\$340,000	\$255,000
2,500		\$1,000,000	\$600,000	\$500,000	\$400,000	\$300,000
5,000		\$1,750,000	\$1,050,000	\$875,000	\$700,000	\$525,000
7,500		\$2,437,500	\$1,462,500	\$1,218,750	\$975,000	\$731,250
10,000		\$3,000,000	\$1,800,000	\$1,500,000	\$1,200,000	\$900,000

*Facilitator Certification and Coach Certification fees may apply if delivering 4 or more modules of content.*

### Licensed Content:

We also offer the ability for our companies to license our content and deliver it within their own LMS and through in-person training events, outside of our systems and ongoing support. These opportunities are handled on a case-by-case basis and are dependent upon the content selected from the program the company desires to license. Pricing is to be determined based on each individual case.

### Contract Terms and Licensing Terms

A contract is required for each sale. Our Contracts are issued as two separate documents. The first is an Agreement, which contains LLGS’s standard legal terms. The standard period of time for this is for **3 years** with an auto-renew clause. Meaning, it remains in force for a minimum of 3 years, and then auto-renews provided neither party terminates this in accordance with the Agreement. LLGS will issue this either as a Master Agreement or a License Agreement – this will be determined by Client Success Operations at the time of issuance.

The second type of contract document is the Order Form or Statement of Work (SOW), which includes the business terms for the product/service a customer is purchasing and outlines the fees/costs of doing business. The Order Form/SOW details what is being purchased and how many (Participant Seats, Facilitator Fees, Coaches Fees), the fees being charged, and the period of time the Customer has to use these items. Our Order Forms/SOWs are set for a **2-year period of time**. However, for larger orders, a longer period of time may be requested.

So, what does this mean? By separating the legal terms (Master Agreement or License Agreement) from the business terms (Order Form/SOW) and keeping the document with the legal terms in-force (Master Agreement or License Agreement), upon renewal or expansion, a Customer only needs to execute a new Order Form/SOW for the newly agreed-upon business terms. This shortens the amount of time required to execute a renewal or expansion because most Order Forms/SOWs do not need to be reviewed by a customer’s procurement or legal area and even if they do, there is very little legal language to review and redline. To account for a Customer’s potential need to purchase an additional facilitator, coach, and/or participants seats, we include a clause in the Order Form/SOW to allow the Customer to “add” seats a la carte at the price quoted in the Order Form/SOW during the Term of an Order Form/SOW (this insulates them at the time from any price increases that may have happened during the Order Form/SOW term).



At that time, if we continue to do business with the client company, a new Order Form/SOW will need to be executed (assuming the Master Agreement/License Agreement is still in-force).

Since the total Licensing Fee is due upon the fully executed Contract (as noted above), at the end of the 2-year period of time, the client company may have unused inventory. Our sales team members should do their best to communicate with the client company and stay on top of their inventory to ensure their Participant Seats are used during the term of the Contract.

### Unused Inventory Considerations and Guidelines

In some cases, prepaid inventory may exceed the Contract timeline. In that case, there are some avenues that we can explore to help use up unused inventory.

- In advance of any Contract expiration for the Trustworthy Selling product lines, customers with outstanding inventory should be given as much notice as possible, with a minimum of 6 months' time, notifying them of unused inventory.
  - Reminders of approaching Contract expirations and unused inventory (if applicable) should be given at 6 months, 90, 60, and 30 days prior to expiration.
- Following expirations, customers with outstanding inventory should be given 60 days to exchange inventory for another product in the Trustworthy Selling product line, reinstate the current product, or share the unused inventory with another area of their organization that may require sales effectiveness training. In the latter case, the company would be responsible for working out any arrangements for reimbursement, etc. from the other area of their organization.
- 90 days after expiration, no refunds or exchanges will be provided. Please make sure that in advance communication to customers, this provision is outlined to customer companies.
- For enterprise customers in a usage tier, unused inventory will not be counted. Instead, customers should be informed of their tier maximum and encouraged to use up to the maximum.
  - If customers are in a higher usage tier, a lower tier can be proposed to meet their needs when their contract is up for renewal.
- Please note – if any contractual provisions contradict these guidelines, the provisions written in the contract will prevail.

### Recommendations and Considerations

The following list shows recommendations and considerations for the new proposed pricing.

- As a rule of thumb, we want to make sure that our customers are getting the best value for their needs, and we want to be fair in relation to our costs associated with administering the product. While this proposal should cover a wide variety of scenarios to meet customer needs, exceptions may occur. Please reach out to Product Manager, [Jacquie Lucas](#) with any exceptional circumstances.
- Occasionally we may offer Preferred Pricing. Preferred pricing makes considerations for a percentage price break or an exact price point. Exercise caution when offering Preferred Pricing to companies as we want to be sure we are being fair and not putting ourselves in a position

where the Preferred Pricing becomes the price. When offering a price break, take the Cost per Participant for the pricing band and discount it by 25% and round down to the next whole or half number. I.e. If you were to offer Preferred Pricing for a RAG Study Group member company for our SkillSet program for up to 100 participants. The published price is \$395 per participant. Offering a 25% discount would make the price \$296.25 per participant. Round down to \$295 per participant. Please reach out to Product Manager [Jacquie Lucas](#) with any exceptional circumstances.

- Our pricing schedules for the Trustworthy Selling product line should be evaluated and reassessed every two years starting in 2026.

### Questions or Comments

For questions or comments concerning this document please contact Product Manager [Jacquie Lucas](#).