



Join Goose to grow your benefits revenue



Goose is the leading business education platform and peer community empowering employee benefits professionals to grow revenue and increase value.

At first glance

Built for benefits professionals by benefits professionals. We get you, and we're here to help you grow your whole business or your book of business.

Goose is the ultimate wingman for single producers looking to grow a sustainable book of business, small to medium agencies aiming to elevate their team, or larger organizations seeking cohesion. Goose provides resources for your whole team, allowing you to create a comprehensive growth strategy.



Goose equips you to elevate your business with:

- online sales training and prospecting courses
- marketing guidance
- ready-to-use content
- service and leadership tools
- a vast resource library

Our community of growth-minded professionals provides an invaluable support network, offering insights, advice, and encouragement. By joining Goose, you're gaining access to a wealth of knowledge and resources and becoming part of a community dedicated to mutual growth and success.

Engagements & Key

BASE

✦ This symbol indicates access

Individual access. Annual membership with monthly or annual billing.

PRO

✦ This symbol indicates access

⬆ This symbol indicates buy up option

Producer + support access. Annual membership with monthly billing.

ENTERPRISE

✦ This symbol indicates access

Team access. Annual membership with monthly billing.

Topical content

Q4i Growth Platform



Content and collaboration for Pillar topics

All businesses need to effectively execute in the four key areas we call Pillars: Marketing, Sales, Service, and Leadership. We dive deeper into each one by breaking them down into four Impact Areas that describe success in more detail.

Pillar areas have access to*:

Online training | Downloadable resources | Ask-a-coach | Peer discussion groups | 30/30 networking sessions

*Pillar access depends on membership

Marketing

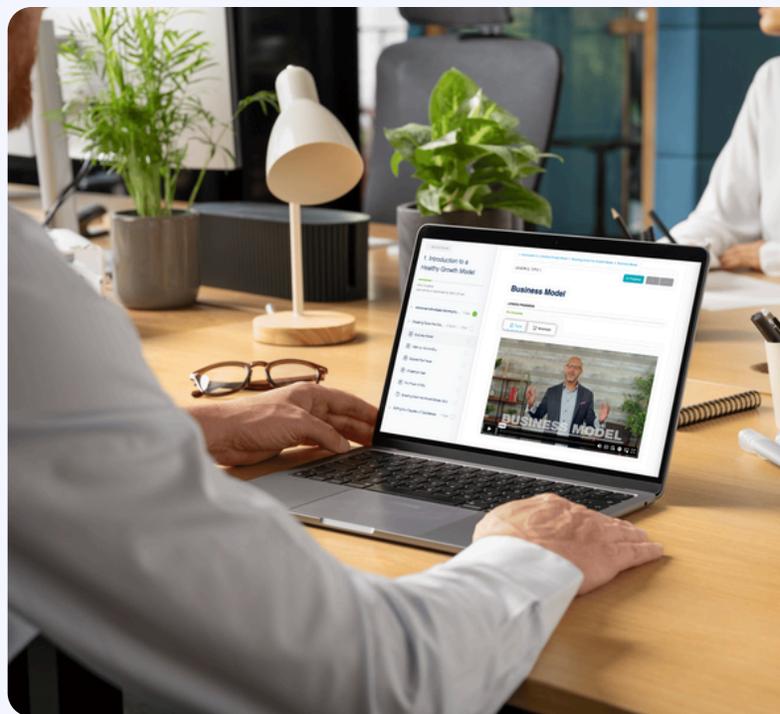
Leverage the power of marketing to communicate effectively with your target audience and earn sales traction and momentum. Learn how to increase your marketing effectiveness through content and resources in the key areas of:

- Defining your plan
- Crafting your message
- Sharing your message
- Leveraging technology

Sales ✨🌟🌟

Use prospecting and selling to improve your approach and offering to prospects. Learn how to increase your prospecting and sales effectiveness through content and resources in the key areas of:

- Sales process
- Solution optimization
- Healthy pipeline
- Effective prospecting



MORE System ✨🌟🌟

Learn how to have more engaging, effective conversations with your buyers using the MORE System. Create a sales approach that is so enticing to buyers that they'd be willing to pay to go through the process. We'll walk you through each step, provide examples of successful sales strategies and tactics, and provide all you need for more confidence, revenue, and sales.

- **Course 01:** Introduction to a Healthy Growth Model
- **Course 02:** The MORE System
- **Course 03:** Making Solutions Work for You in the Sales Process
- **Course 04:** Building a Book of Business for Long-term Growth
- **Course 05:** How to Fill Your Pipeline with Quality Prospects

The full MORE Sales System curriculum is outlined starting on page 12.

Service

Envision and deliver your desired client experience, and create an environment where people want to come to work. Increase the impact of your client service efforts through planning, strategy, and intentional execution in the key areas of:

- Client experience
- Cohesive teams
- Resell strategy
- Processes and procedures

Leadership

Owning an agency and leading a team that supports the many decisions leaders must make takes learned knowledge and skills. Increase your leadership effectiveness through content and resources to address the key areas of:

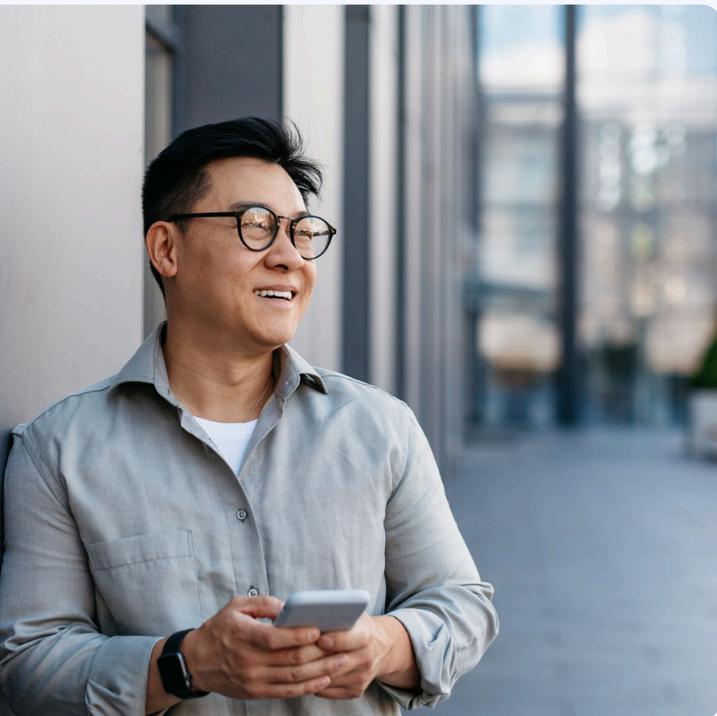
- Vision
- Culture
- Multi-level planning
- Effective communication



Non-insurance Solutions

To have confident, effective sales conversations, you must have confidence in your resources. Goose provides a place to collaborate with peers as you research and source solutions and providers. Review the Vendor Directory and discuss implementation and utilization issues with the peer community.

Gain access to key solutions that enhance your non-insurance offerings:



Compliance ✨🌟🌟

Alerts and webinars regarding benefits-related compliance issues. Option to submit compliance questions to our compliance partner. [↑](#)

HR updates & education ✨🌟🌟

HR content and alerts. Option to access HR/compliance libraries and submit HR questions to our HR partner. [↑](#)

Coach & Peer Engagement

Ask-a-coach

Submit questions to our team of coaches and specialists to receive personalized coaching and guidance for your business.

Areas of expertise include:

1. Marketing
2. Sales
3. Service
4. Leadership
5. Compliance
6. Human Resources



Peer Accountability and Roundtable (PAR)

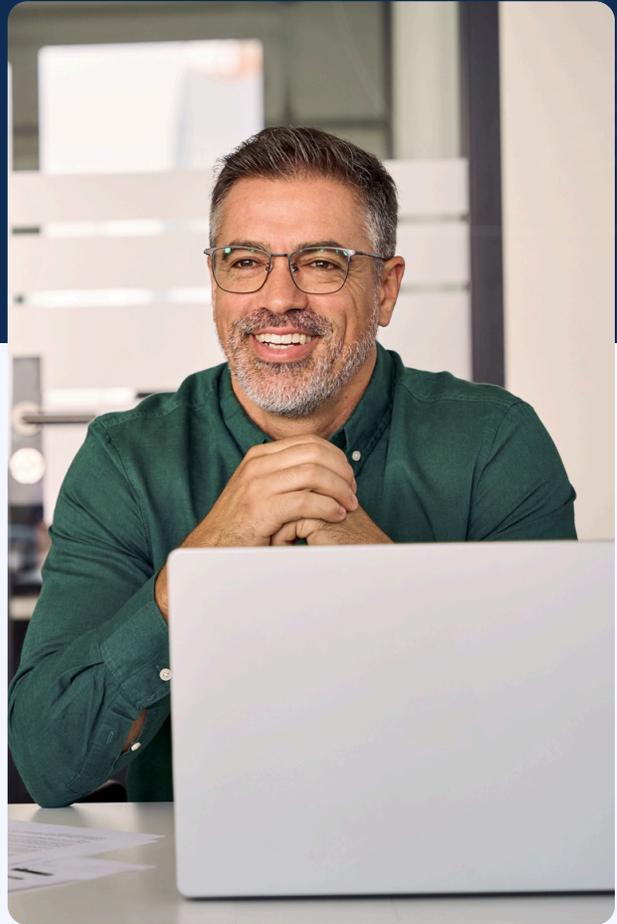
Peer discussion groups with other Goose members looking to accomplish similar growth goals. In monthly video calls and a dedicated online discussion group for sharing, you'll collaborate with your peer group, set measurable goals, discuss real challenges, hold yourselves accountable, and have a little friendly competition along the way.

Analytics

Measurement Tools

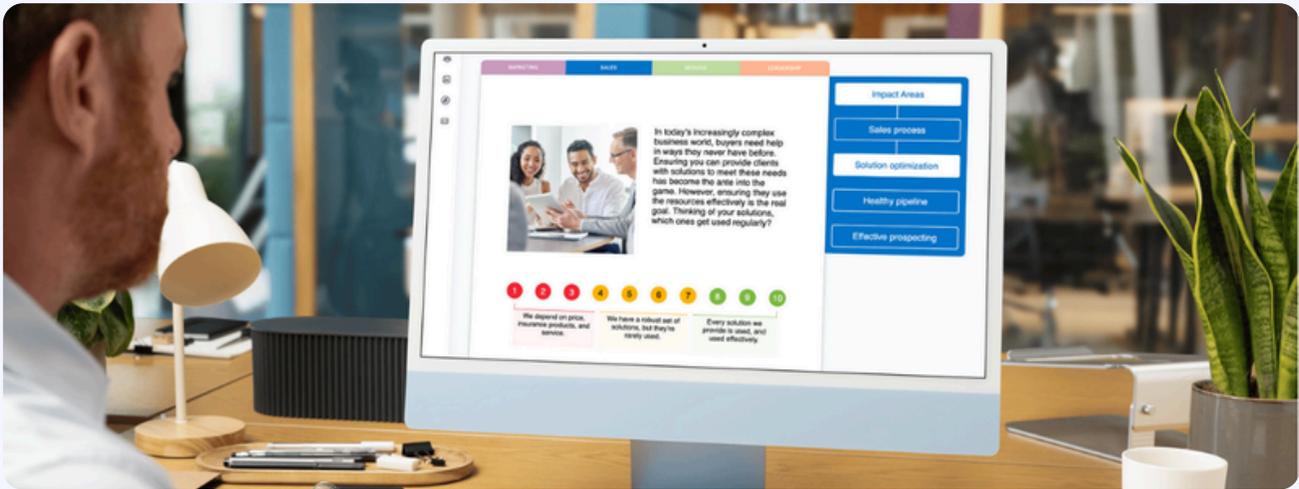
Dashboard and Measurement Tools ✨🌟🌟

Our self-reflection analysis tools will help you identify and quantify your areas of strength and opportunities for improvement. Using your scores as a guide, jump into the training and resources on the Goose platform to address each area.



Agency Growth Index ✨🌟🌟

An overall analysis of agency operations in the four Growth Platform Pillars of Marketing, Sales, Service, and Leadership. Each Pillar is broken down into four Impact Areas, resulting in a 16-point scorecard that reflects the agency's growth readiness.



Marketing Index ✨💡💡

This analysis tool provides a more detailed look at your marketing readiness and proficiency. It breaks marketing down into four Pillars: Intent, Audience, Message, and Traction, and each Pillar is further broken down into four Impact Areas. The Marketing Index score includes a 16-point scorecard reflecting the agency's marketing strengths and weaknesses.

Sales Index ✨💡💡

This analysis gets significantly more granular about an agency's or producers's sales readiness and proficiency. This analysis tool breaks sales down into four Pillars: Pipeline, Engagement, Impact, and Discipline, and each Pillar is further broken down into four Impact Areas. The Sales Index score returns a 16-point scorecard reflecting how well the agency or producer is positioned to achieve sales success.

Healthy Pipeline Index ✨💡💡

This analysis allows an individual producer or a sales manager to measure, track, and bring focused improvement to the health of a prospect pipeline.

Marketing

DIY Marketing Content

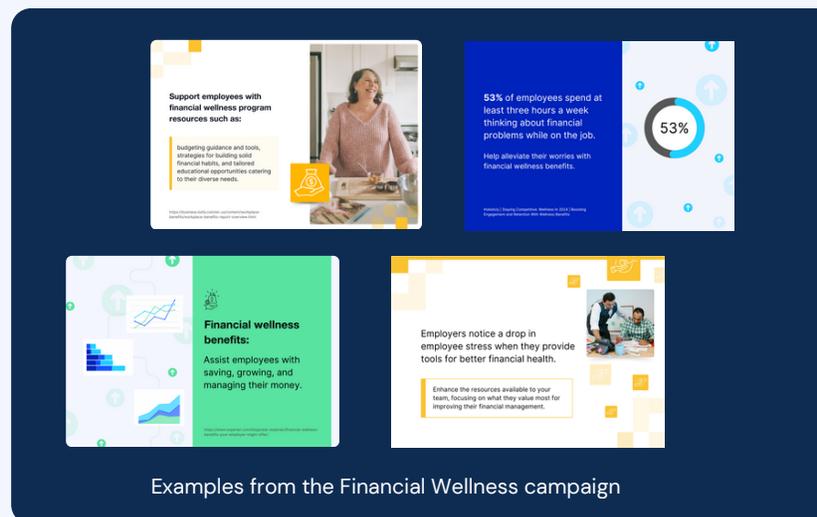
Connect with your audience using our marketing content that speaks directly to the concerns and needs of your prospects and clients. Publish ready-to-share marketing content on your website, newsletters, and social media.

Quarterly Compliance Webinars ✨🌟🌟

Help your clients and prospects stay current with benefits compliance by sharing alerts and inviting them to Quarterly Compliance Webinars.

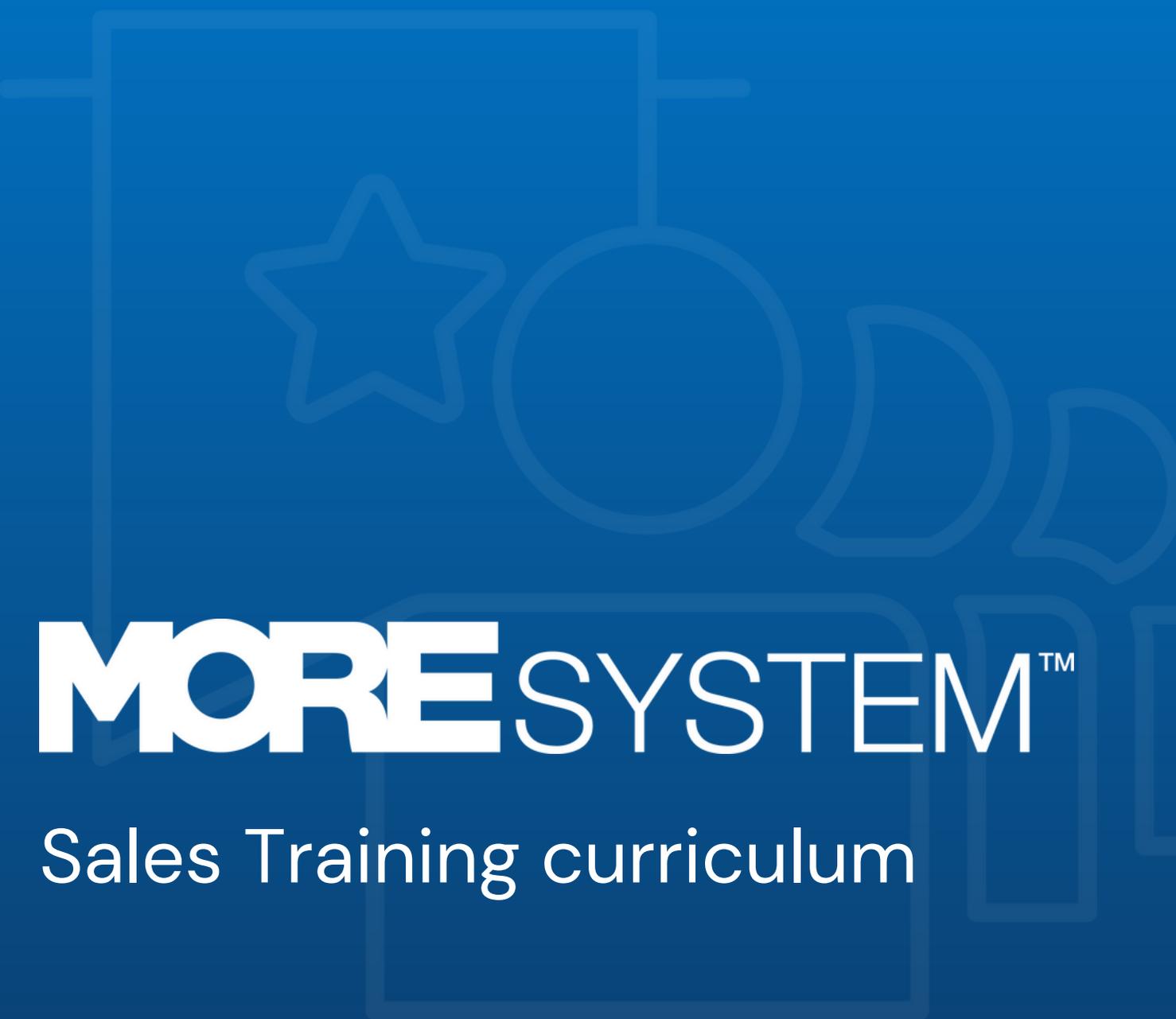
Quarterly Campaigns ⬆️🌟

Receive content for a marketing campaign about a benefits or HR topic every three months. The campaigns include various content formats, such as social cards, videos, infographics, and downloadable guides.



Weekly Roundup ⬆️🌟

Receive four weekly articles on HR, employee benefits, compliance, and business management topics to share with your audience on social media and in newsletters.



MORE SYSTEM™

Sales Training curriculum

A proven path to filling your pipeline, closing more deals, and building a more profitable book of business.

Q4iINTELLIGENCE

CURRICULUM OUTLINE

A breakdown of the video training courses that will guide producers to build and maintain healthy habits that drive predictable sales and growth.



Course 01: Introduction to a Healthy Growth Model

Rather than having their own growth model, most agencies operate as more of a franchised distributor for the insurance carriers. This course lays out a healthier model that puts the producer and agency in control of their own growth and success.



Module 1 - Introduction video

A welcome from your coaches introducing you to your growth experience and highlighting the exciting learning that lies ahead.





Course 01



Module 2 - Breaking Down the Growth Model

Explore the vulnerabilities of the typical agency's business model and lay out a stronger foundation for a healthier model.

Video 1: Business Model

Break down and analyze the dangerous elements of the typical agency business model and discuss a healthier approach for each.

Video 2: Want vs. Have to Buy

Learn how to shift the focus from what your buyers **HAVE** to buy and resent buying to what they really **WANT** to buy and value.

Video 3: Expand Your Value

Explore how salespeople must evolve to remain relevant and bring increasing value to the sales conversation.

Video 4: Challenger Sale

A breakdown of the five distinct sales profiles. Dive deeply into why you must become a Challenger throughout the sales process.

Video 5: The Power of Why

Analyze the critical elements of a complete and effective sales message and the importance of approaching them in the right order.



Course 01



Module 3 - Selling Is a Transfer of Confidence

This module breaks down the sources of confidence found in the most effective salespeople.

Video 1: Client Impact + Story + Pipeline

Identify and break down the three most critical factors that lead to sales confidence.



LINDSAY CLARKE-YOUNGWERTH
MANAGING PARTNER, THE SHANDRO GROUP

"I don't remember the last time I was so confident in the future of my business! I made this investment in myself so I could feel this way again. Thank you!"





Course 02: The MORE System

This sales training course will introduce you to the MORE System, a consultative sales process that drives consistent sales results and ensures the buyers on the receiving end make the best buying decision possible.



Module 1 - Solutions Introduced

This module explains how to extract the maximum value from your solutions for your and your clients' benefit.

Video 1: Introduction to Solutions

Learn how to use your (value-added / non-insurance) solutions to deliver a significantly greater impact for your clients.



Module 2 - MORE Overview

This module will provide a general overview of the MORE System and look at the key elements that make it work.

Video 1: Setting the Stage

Discover two key elements that pull prospects into your sales process and keep them moving forward.

Video 2: A High-Level Overview of the MORE System

As the title implies, this video will provide a high-level look at the entire MORE System sales process.





Course 02



Module 3 - Strategic Analysis

This module explains how to effectively execute the Strategic Analysis, the second phase of the MORE System that clearly identifies the buyer's needs.

Video 1: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Strategic Analysis.

Video 2: Do you agree?

Evaluate how your beliefs align with the MORE System philosophies through a series of questions.

Video 3: Strategic Analysis Walkthrough

Break down the details of the Strategic Analysis phase of the sales process.

Video 4: Role Playing of Strategic Analysis

Hear how the Strategic Analysis is delivered.

Video 5: Preparing and using the Strategic Analysis Document

Learn how to build your version of the Strategic Analysis.



Module 4 – Strategic Alignment Plan

This module explains how to effectively execute the Alignment Plan, the third phase of the MORE System that details how you will bring improved results to the buyer.



Course 02

Video 1: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Alignment Plan.

Video 2: Strategic Alignment Plan Walkthrough

Break down the details of the Alignment Plan phase of the sales process.

Video 3: Role Playing of Strategic Alignment Plan

Hear how the Alignment Plan is delivered.

Video 4: Preparing and using the Strategic Alignment Plan Document

Learn how to build your version of the Alignment Plan.



Module 5 - Executive Briefing

This module explains how to effectively execute the Executive Briefing, the first phase of the MORE System that explains a more logical approach for buyers to choose their benefits advisor.

Video 1: 3-Year Working | Not Working

We share a powerful conversation to differentiate yourself and get the buyer to discuss their goals.

Video 2: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Executive Briefing.

Video 3: Executive Briefing Walkthrough

Break down the details of the Executive Briefing phase of the sales process.

Video 4: Role Playing of Executive Briefing

Hear how the Executive Briefing is delivered.

Video 5: Preparing and using the Executive Briefing Document

Learn how to build your version of the Executive Briefing.





Module 6 - Establishing Habits

This module dives into habits and tools that keep you focused and productive.

Video 1: Training to Traction | Next 90 Days

Start building a 90-day plan to turn your new ideas and tools into sustainable habits.



DAVID GRANT | PARTNER, SGL PARTNERS

“It has been a while since I have felt so much purpose in my job. I appreciate it, and I am ready to learn more and make my craft so much better.”





Course 03: Making Solutions Work for You in the Sales Process

This course will detail how to structure and use solution documents as integral pieces to the MORE System.



Module 1 - Document Workshop / Putting It to Work For You

This module will focus on tools and effective strategies to capture and document your solutions.

Video 1: Introduction to Solutions

Learn how to use your (value-added / non-insurance) solutions to deliver a significantly greater impact for your clients.

Video 2: Taking Solution Inventory

Get started on a systematic approach to identifying and tracking your collection of solutions.

Video 3: Building and using Solution Worksheets

We introduce a worksheet that ensures you understand, communicate, and implement your solutions more meaningfully.





Course 04: Building a Book of Business for Long- term Growth

This course focuses on strategies to drive consistent, predictable, and increased levels of growth.



Module 1 - Know Your Numbers

This module will focus on ways to quantify your performance, from prospecting to execution to maintaining a healthy book of business.

Video 1: Key Performance Indicators

Discover and dissect the most critical metrics of growing your business.

Video 2: Book of Business

We show you how to analyze the financial health of your book of business.

Video 3: Gold-Silver-Bronze Goal Setting

We'll walk you through a process to confidently set a sales goal that will most likely result in a higher target than you would set on your own.



Course 04



Module 2 - Establishing Healthy Habits

This module dives into habits and tools that keep you focused and productive.

Video 1: Weekly Planning | Blocking Time

We introduce an approach to ensure effective time management.

Video 2: Keeping the Pipeline Flowing

Learn proven strategies that keep prospects progressing through the pipeline.



TAYLOR LINDSEY | VICE PRESIDENT & ADVISOR, EMPLOYEE BENEFIT CONSULTANTS

“New business growth has experienced 20% or more compounding growth (less in 2020) for the past five years with our involvement with Q4i. We have successfully more than doubled our business in that amount of time and have goals to do it again by 2025.”





Course 05: How to Fill Your Pipeline with Quality Prospects

This course will share prospecting insights that will help ensure your pipeline is filled with the right number of the right opportunities.



Module 1 - Filling Your Pipeline

This module focuses on the most important sales ability of all—building and maintaining a healthy pipeline.

Video 1: Tiering Exercise

Solve the mystery of how to fill your pipeline with the highest quality opportunities possible—referrals from existing clients.

Video 2: Centers of Influence

A step-by-step process of how to establish center-of-influence relationships that become the powerful growth partnerships they need to be.

Video 3: Cold Approaches

Despite what most salespeople want to believe, cold approaches to prospecting can still be effective, and we'll explain how.





Let's get to work.

In a world where the sales landscape is constantly evolving, staying ahead means not just keeping pace but setting the pace. This comprehensive curriculum has been meticulously crafted for sales professionals like you, who are driven to excel and grow their business. We dive deep into the tactics that make a difference, equipping you with skills to outperform and outlast in today's competitive market. Welcome to the path of relentless improvement towards new heights of success.

