

Sales Team Updates

Growth // Grit // Guidance

December 2025

Celebrating Our Recent Wins

We're thrilled to share our latest sales achievements from August-November.

Month	Client	Producer(s)	Amount
August	Gooseneck Implement Company	Jackie Ronning	\$89,000
August	Human Kinetics, Inc.	Madeline Harrison & Heather Acerra	\$66,000
August	Millikin University	Madeline Harrison	\$65,000
September	Remprex, Inc.	Heather Acerra	\$142,000
September	Liquid Trucking	Jamie Bishop	\$84,000
September	The Homeless Alliance	Jackie Ronning & Tyler Jenkins	\$57,000
October	The Original Mattress Factory	Nichole Schnee	\$75,000
October	Witt Brothers Exchange, Inc.	Jamie Bishop	\$68,000
October	Ankeny Community School District	Brad Feldott & Dan Neitzel	\$98,000
November	T&W Tire LLC	Jackie Ronning & Tyler Jenkins	\$150,000
November	Universal Transportation Services	Jill Lange	\$46,000
November	Voortman USA	Josh Surber	\$40,000

Sales Success Year-To-Date

Actual Written & Lost Business

Metric	Actual (Through Nov)	Goal	Variance
New Business Written	\$7.25M	\$8.45M	Behind by \$1.2M
Lost Business	\$3.7M	\$3.7M	On target
Net New Business	\$3.5M	\$4.7M	Behind by \$1.2M



Producers Over \$100K Net New Business

Rank	Producer	Net New
1	Julie Oeth	\$572,615
2	Jackie Ronning	\$495,351
3	Kim Beck	\$387,569
4	Jill Lange	\$364,196
5	Eddie Rios	\$312,030
6	Nikki Goodchild	\$218,097
7	Joe Zack	\$207,550
8	Heather Acerra	\$188,137
9	Katie Bushaw	\$176,923
10	Tyler Jenkins	\$119,157
11	Mark Rapp	\$118,534
12	Sandy Matz	\$100,784

New Producer Results

The continued work put in by our newest producers has continued to help grow and elevate our practice. Since 2023, the #'s outputted by those classified in our "New Producer Cohort" have grown drastically (and still have another month in the year!).

- **58% Increase** in the # of FT producer prospecting each month
- **134% Increase** in the # of calls made
- **96% Increase** in the # of meetings being set
- **77% Increase** in the amount of closed won business

Additionally, we saw **3** producers get their FIRST win this year, and another **6** new producers on track to achieve \$100K+ in net new business written!

New Producer Hiring

As the practice continues to grow, we are continuing to emphasize growing our producer headcount while maintaining a standard of excellence for those that come into the business. To do this, we are focusing efforts on a few different areas:

- **Sales intern growth**, with a target of 10 benefits sales interns for 2026 – a **2x** increase from the # of interns we had in 2024 intern (3 spots filled thus far).
- **FT headcount growth**, with a target of net 9 FT producers – with expansions planned for Madison, Dubuque, and Des Moines (2 spots filled thus far).
 - Adding another sales manager is also on the roadmap for 2026/27 to help manage the increased producer headcount.
- **Recruitment coordination**, more strategic alignment and consistent connection with recruiting to better identify and target top-end recruits for the business.
- **More rigorous interviews**, combining elements of live roleplays, case study preparation, video submissions (starting in 2026) and questions centered around identifying core traits of a successful producer.
 - **Taylor's Favorite Question:** Level with me - if I was to ask your parents "what's one thing you suck at that they've been telling you to work on" - what would they say?
 - **James' Favorite Question:** Roleplay asking recruits to "sell me on" things such as: becoming a fan of the Chicago Bears, donating to Iowa State University, a Hatch alarm clock, a Steinhafel's sectional, and more. *Note* – the Bears roleplay was only subpar.



New Producer Training & Resources

As we've increased sales activity and headcount dramatically over the past few years, we've needed to redesign our approach to training new producers. Integrating more standardized onboarding & development paths while continuing to emphasize apprenticeship and ride-alongs.

- **Ride along emphasis**, with our senior and mid-tenure producers ("the masters") helping demonstrate to our newer teammates through bringing them on prospect/client meetings how we help groups and how to be a successful producer.
 - *"Don't fingertaint in the streets when you've got the opportunity to see and learn from the Leonardo's, Raphael's, and Michaelangelo's create art in the workshop."*
- **Corporate Sales Academy**, with 2 sets of new producers having already gone through, focusing on developing the baseline sales skills for a producer with a combination of lectures and live roleplays with senior producers/management.
 - Imagine roleplaying a cold call in front of Nicole, Mark Roling, Michael Kelly, and Ryan Butler + 20 other peers in the Lower Level Roshek Auditorium – fun times for those going through the Academy!
- **Development plan redesign**, with a 30-week development plan crafted (planning to integrate into new LMS in 2026), that provides producers a better foundation on the "Basics of Benefits" – inspired in part by the work done by Malorie & the training/consultant team.
- **Get Smart trainings**, with over 36 sessions of targeted training on topics ranging from level-funding to alternative medical networks to business planning.
- **A producer dashboard** is also being built to better summarize the mass of Salesforce data for producers, illustrate it in an actionable manner, and make the process of prospecting accounts more efficient and personalized.

Seminars

The 2025 seminar series drew 688 total attendees across seven Midwest locations, including 489 clients/prospects, 96 internal team members, and 103 sponsors. In looking back at 2024 attendance to 2025, 11 groups became clients in 2025 after attending events in 2024. Green Bay drew the largest crowd at 124 attendees. Which seminar will claim the top spot in 2026?

Event	Client/Prospect Attendance	Prospect Attendance	No Shows	Attendee Rate
Peoria	49	26	21	70%
Pewaukee	92	65	51	64%
Minneapolis	34	26	34	50%
Des Moines	53	40	34	61%
Oak Brook	67	57	66	50%
Iowa City	70	34	53	57%
Green Bay	124	88	68	65%
Total	489	336	327	Avg: 60%

CEO Summit

We launched our inaugural CEO Summit in 2025, attracting 59 clients and prospects. This premier event positions C&B as a thought-leader partner, equipping CEOs with actionable strategies and peer-validated solutions to tackle complex challenges. Stay tuned for 2026 CEO Summit details!

Value Prop Campaign

Our 2025 value prop email campaign targeted HR and finance contacts to transform cold suspects into opportunities through consistent, strategic outreach. The campaign successfully moved over 3,500 previously cold suspects into active engagement. The significant increases in "Engaged" and "Very Engaged" segments demonstrate that our value proposition messaging resonated, generating warmer leads for producers while revealing strong interest in cost containment solutions.

Industry Benchmark Reports

We targeted key industries with customized benchmark reports in 2025, generating 39 requests through our landing page from suspects in HR and finance roles across Higher Ed, Manufacturing, Government, Agriculture, Construction, Elementary & Secondary Schools, Hotels & Recreational Services, Transportation and Warehousing. Government, Higher Ed, and Agriculture showed the strongest interest, providing valuable direction for future targeted campaigns.

These initiatives demonstrate the power of strategic, data-driven marketing in building meaningful connections and driving business growth. The insights gained from our 2025 campaigns, from seminar attendance patterns to industry-specific engagement, will help shape our 2026 strategy, allowing us to refine our approach and deliver even greater value to the benefits team in 2026.

2025 Wrap-Up

As we wrap-up 2025, though new business results lagged where we had budgeted, we've got a TON of momentum heading into 2026. Senior producers are continuing to lead the charge on new business while mentoring and giving insight to the next generation of producers. Mid-tenured producers continue to pick up steam while dipping their toes into the mentorship game as well. And new producers are putting in the necessary upfront "capital investment" of prospecting effort and energy to reap the rewards of new business won in the next 1-3 years (or more).

All in all, the awesome efforts by the team in 2025 are looking to set us on a great path for 2026 and beyond. Looking forward to all that's to come.

"Barbeque sauce." – Ted Lasso



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