

Sales Team Updates

Talent /// Training /// Triumphs

August 2024

We've got some exciting updates to share! Over the past year, our sales team has been on an incredible journey of growth and development. From welcoming new faces to launching innovative training programs, and smashing our business goals, there's a lot to celebrate. Let's keep the momentum going!

New Teammates

We've added 10 new teammates in the last 12 months and 5 sales interns, which is the most we've added by almost 3x in previous years. This is in an effort to build our growth in the years to come. Lots of effort is being put into the recruiting and development side of the sales team, as well as helping the largest producers scale for continued growth (i.e. Brian, Mark, and Daniel working closely with senior producers like Eddie did with Kim):



Tyler Jenkins
Dubuque



Julie Oeth
Dubuque



Daniel Nietzel
Dubuque



Josh Surber
Des Plaines



Mark Rapp
Dubuque



Tyler Offield
Dubuque



Brian Sholty
Madison



Jesse Schromen
Dubuque



Emily Vorpahl
Madison



Cole Skelton
Dubuque

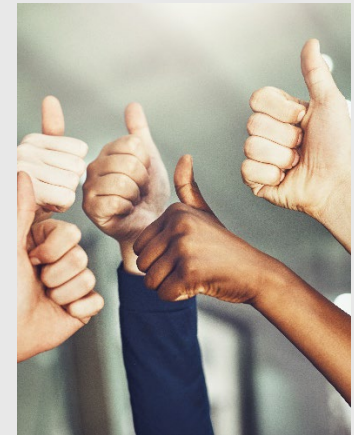
Interns: Genevieve Reed, Landon Stoll, Connor Chew, Nolan Leslie, and Madison Meador

Developmental Training for New Hires

We have dramatically expanded our developmental training for new hires. This includes weekly technical and sales training sessions in Benefits, as well as the creation of our Sales Academy, which goes live on August 20, 2024. This new program, similar to EBU, will provide sales-specific training to all new hires across the entire firm during their first year.

Mid-Year Business Performance

Through the first six months, we are \$600K over our prorated new business goal and approximately \$50K over our net new business goal, even after accounting for lost business. The biggest months are still ahead, with over \$2.5M in new business currently in progress from July through October.



Top 10 Net New Business:

YTD Net New Business

01/01/2024 - 06/30/2024

Rank	Producer	Net New
1	Nikki G	\$298,779
2	Jamie B	\$277,680
3	Jackie R	\$257,845
4	Joey B	\$200,773
5	Jill L	\$174,571
6	Kim B	\$167,444
7	Mark K	\$164,754
8	Tim A	\$157,593
9	Heather A	\$155,782
10	Chris W	\$114,308