

Sales Team Updates

Goals // Guidance // Growth

November 2024

Sales By the Numbers

Our team continues to build remarkable momentum this year, outperforming our goals with **\$7.38M** in new business written against our \$6.6M YTD target. While we've faced some challenges with **\$3.48M** in lost business, our net new business stands at **\$3.9M**, keeping us ahead of our \$3.8M YTD goal.

A huge shout-out to our sales leaders who are driving exceptional results in both new business and net new business:



Joey Backus
New Business: \$673K
Net New: \$471K



Sara Dickinson
New Business: \$544K
Net New: \$455K



Kim Beck
New Business: \$522K
Net New: \$520K

Congratulations also to: Eddie Rios (\$368K new business / \$365K net new); Jamie Bishop (\$420K new business / \$339K net new); Nikki Goodchild (\$347K new business / \$307K net new); Jackie Ronning (\$352K new business / \$303K net new); Jill Lange (\$325K new business / \$251K net new); Chris Williams (\$223K new business/net new); Julie Oeth (\$177K new business/net new); Mark Kaczmarek (\$229K new business / \$169K net new); Heather Acerra (\$156K new business/net new); Tyler Jenkins (\$153K new business/net new); Brad Feldott (\$213K new business / \$116K net new)

Looking forward, our pipeline remains strong with \$4.5M in opportunities being worked for the next 90 days, plus an additional \$900K in enhancements and re-enrollments from our non-med team - positioning us well to exceed our \$3M target for the upcoming quarter and build momentum for 2025.

Client Success Stories

Stonehill Communities: Innovation in Healthcare Benefits

Situation: Stonehill faced a critical challenge with their health insurance renewal: a staggering 26% increase on already high premiums. Their existing plan, which included a "first dollar HRA," was seeing unsustainable utilization rates and costs running \$5,000 above benchmark per member.

Our Solution: We transformed their approach by implementing an Individual Coverage HRA (ICHRA). This allowed employees to shop the individual market with Gravie to find plans matching their specific needs, while Stonehill provided dedicated funding support.

Impact: The results were immediate and significant - saving \$666K or 37% on total health plan costs compared to their renewal (\$394K below prior year costs). With these immense savings, employee payroll deductions dropped by 70%, putting an average of \$3,200/yr back in employee pockets. Additionally, Stonehill reduced their company healthcare costs by 7%, allowing the organization to reinvest those savings into expanded employee value through company-paid Short-Term Disability and enhanced Telehealth access. A dramatic win for both the company and employees all around.

FEDlogic Medicare Solutions: Expert Guidance

We continue to demonstrate our expertise in complex benefits situations. In a recent case, we helped a COBRA participant with ESRD transition smoothly to Medicare coverage. In another notable success, our team's review for a client executive uncovered \$15,000 in previously unknown Widow's Benefits - a perfect example of how our comprehensive approach goes beyond basic coverage solutions to deliver real value.

[Read more here.](#)

Keep an eye out for more case studies in the [Sales Resources Center](#) over the next few weeks.

What's New at C&B?

Sales Academy Achievement

The Sales Academy, our 12-week training program for newer producers, continues to drive excellence in our sales approach. Under Mike Pudlo's energetic leadership and Kevin Miller's performance coaching, our team is mastering everything from engaging storytelling to strategic prospect engagement.

Our recent Sales Story Competition showcased these developing skills, with Brian Sholty taking top honors in the Benefits division. The competition featured compelling 5-minute presentations on value propositions, with strong performances from Josh and Jack in the preliminary rounds. Our senior leadership team, including Nicole, David, Roling, and Vogel, provided valuable feedback during the final presentations in the Roshek building.



Building Our Brand

We're elevating our market presence through new studio-recorded seminar shorts from Brianna and Heather, expanding our value-added content library. Our sales team is taking a leadership role in brand building through strategic use of our Sales Resource Center, value-add email library, and focused social media presence.

Looking Forward

To continue our momentum, please engage with our growing resources:

- Follow C&B Benefits on [LinkedIn](#)
- Explore our updated [Sales Resource Center](#)
- Leverage our expanded content library in your client communications.

Together, we're creating exceptional value for our clients and building a stronger future for C&B.