

2026 Retail Sales Symposium Agenda

Tuesday, April 21, 2026 – Thursday, April 23, 2026 // Denver, Colorado

Tuesday, April 21

Denver, Colorado

Before 4:00 PM	Arrivals	<i>NA</i>
3:30 – 5:30 PM	Badge Pick-Up	<i>Grand Foyer</i>
5:30 – 6:00 PM	Opening Ceremony: Welcome & Introductions <i>Presenters: Steve Hearn & John Esposito</i>	<i>Spruce Ballroom</i>
6:00 – 8:00 PM	Happy Hour & Dinner <i>Sponsored by Carriers</i>	<i>Spruce Ballroom</i>

Wednesday, April 22

Denver, Colorado

6:30 – 8:00 AM	Breakfast	<i>Grand Foyer</i>
7:30 – 9:00 AM	Vendor / Product Fair	<i>Spruce Ballroom</i>
9:00 – 10:30 AM	General Session	<i>Alder Ballroom</i>
	Welcome: Sales Vision	<i>Steve Hearn</i>
	Accelerate Platform: Structure & Strategy Why This Change?: National Platform, Local Execution	<i>John Esposito</i>
	Core Four: Prospecting, COIs, Cross-Selling, Sales Effectiveness	<i>LOB Leaders</i>
	Analytics & Insights: How to Lead with Data	<i>Arun Narayanan</i>
	Wealth Creation Opportunities: PIP, SIP, TSSP, Wealth Dashboard and More	<i>Steve Farmer</i>
	Closing	<i>John Esposito</i>

Wednesday, April 22

Denver, Colorado

10:30 – 10:45 AM	Break	
10:45 AM – 12:00 PM	Breakout Sessions See LOB Agenda on following page	<i>See LOB Agendas</i>
12:00 – 1:15 PM	Lunch Sponsored by First Insurance	<i>Grand Foyer</i>
1:15 – 2:30 PM	Breakout Sessions See LOB Agenda on following page	<i>See LOB Agendas</i>
2:30 – 2:45 PM	Break	
2:45 – 5:00 PM	Breakout Sessions See LOB Agenda on following page	<i>See LOB Agendas</i>
5:00 – 6:00 PM	Break	
6:00 – 7:00 PM	Evening Session / Rally	<i>Alder Ballroom</i>
7:00 – 9:00 PM	Closing Ceremony Pub Crawl Sponsored by Aetna, Nationwide, Old Republic and UHC	<i>Spruce Ballroom</i>

Thursday, April 23

Denver, Colorado

Departures

– [Continue to LOB Agendas for Breakout Sessions](#) –



Property & Casualty Breakout Session Agenda

Location: Maple // Facilitator: Tim Soriano

10:45 – 11:00 AM	Welcome & Outcomes	Tim Soriano
11:00 – 11:15 AM	Skills & Reps: One-Minute Drills and Cold Call Reps	TBD
11:15 AM – 12:00 PM	Pipeline Creation: Prospecting, COI's and First Meetings	Joe Benz
12:00 – 1:15 PM	Lunch Sponsored by First Insurance	Grand Foyer
1:15 – 1:30 PM	Reset: Afternoon Goals	Tim Soriano
1:30 – 2:00 PM	Selling Brown & Brown: How We Win	Nicole Long
2:00 – 2:30 PM	Wholesale & Placement Strategy Reminder	Mark Manzi
2:30 – 2:45 PM	Break	
2:45 – 3:30 PM	State of the Market: Where to Win Now	Andrew Golub
3:30 – 4:00 PM	Property: Model Results: How to Review and Sell With It	Mike Vega David Lee
4:00 – 4:45 PM	Introducing RPD, and Role Plays: How to Fire Your Broker; Soft Market Play; Cross-Sell Opportunities	Skip Cornell TJ Pare
4:45 – 5:00 PM	Commitments, Next Steps, and Closing	Tim Soriano

Employee Benefits Breakout Session Agenda

Location: **Boxelder** // Facilitator: **Josh Conklin**

10:45 – 11:00 AM	Kickoff: Practice Alignment and Winning in the Market	<i>Josh Conklin</i>
11:00 AM – 12:00 PM	Core Four Vision / Leveraging to Win / Weekly Execution Plan <ul style="list-style-type: none"> • Prospecting • COI Development • Cross-Sell • Sales Effectiveness 	<i>Bryan Koehler</i> <i>Scott Cowley</i> <i>Josh Conklin</i> <i>Jared Bowcutt</i>
12:00 – 1:15 PM	Lunch Sponsored by First Insurance	Grand Foyer
1:15 – 1:45 PM	Core Four Vision / Leveraging to Win / Weekly Execution Plan (cont.) <ul style="list-style-type: none"> • Prospecting • COI Development • Cross-Sell • Sales Effectiveness 	<i>Bryan Koehler</i> <i>Scott Cowley</i> <i>Josh Conklin</i> <i>Jared Bowcutt</i>
1:45 – 2:30 PM	Connecting the Dots to Win Business COE Breakouts <ul style="list-style-type: none"> • What, Why, Value Proposition, Who and How to Contact • Stop Loss/Analytics/Risk 360 • Population Health • Pharmacy 	<i>Chad Fuller</i> <i>Jared Bowcutt</i> <i>Josh Conklin</i> <i>Scott Cowley</i> <i>Kelly Polinski</i> <i>Bryan Koehler</i> <i>Laura Birkel</i>
2:30 – 2:45 PM	Break	
2:45 – 3:50 PM	Leveraging Connecting the Dots to Win Business COE Breakouts <ul style="list-style-type: none"> • What, Why, Value Proposition, Who and How to Contact • Stop Loss/Analytics/Risk 360 • Population Health • Pharmacy 	<i>Chad Fuller</i> <i>Nick Bozich</i> <i>Kelly Polinski</i> <i>Peter Devlin/Mike Waters</i> <i>Laura Birkel</i>
3:50 – 4:45 PM	<ul style="list-style-type: none"> • Weekly Education Plan • Sales Stages / Pillars / Resources • Business Planning Execution and Action Plan 	<i>Josh Conklin</i> <i>Scott Cowley</i> <i>Jared Bowcutt</i>
4:45 – 5:00 PM	Commitments, Next Steps, and Closing	<i>Josh Conklin</i>



Personal Insurance Breakout Session Agenda

Location: Cherry // Facilitator: Veronica Jimenez

10:45 – 11:00 AM	Welcome & Opening Remarks	Caitlin Rascelles Veronica Jimenez
11:00 – 11:30 AM	Opening Roundtable: 'The Win'	Kate Buchanan Nick Licursi
11:30 AM – 12:00 PM	Prospecting Channels	Corey Walker Gino Mancini
12:00 – 1:15 PM	Lunch Sponsored by First Insurance	Grand Foyer
1:15 – 1:50 PM	Converting Opportunities: From First Meeting to Close	Jared Tucker Veronica Jimenez
1:50 – 2:30 PM	Integration of Marketing Tools & Technology	Caitlin Rascelles Jessica Celona Whitney Peterson
2:30 – 2:45 PM	Break	
2:45 – 3:15 PM	Cross-Sell Initiatives & Internal Partnerships	Caitlin Rascelles Kim Palmer (Bridge) Ryan Jensen (Nationwide)
3:15 – 4:15 PM	Scaling COI Relationships	Nick Licursi Veronica Jimenez Marcus Tucker (Liberty Mutual)
4:15 – 4:50 PM	Time Management, Productivity, & Consistency Panel Discussion	Jared Tucker Kate Buchanan Gino Mancini Corey Walker
4:50 – 5:00 PM	Commitments, Next Steps, and Closing	Veronica Jimenez