TRUSTED RISK ADVISOR™

CERTIFICATION PROGRAM

CONSULTING...DIAGNOSING...PROTECTING

BEYOND INSURANCE

MAIA

ABOUT THE CERTIFICATION PROGRAM

The Trusted Risk Advisor™ certification from Beyond Insurance is a symbol of professional excellence in consultative, diagnostic sales and mastery of risk advisory knowledge. By obtaining the Trusted Risk Advisor™ certification, you will differentiate yourself with insureds, carriers, centers of influence, and your community through the quality of education, knowledge, and diagnostic process you possess.

The engaging program offers training and coaching in consultative and diagnostic sales using a five-step enterprise risk management platform.

The TRA program has an average Net Promoter Score (NPS) of **75%**. You will receive a total of **28 CEs** upon completion of the TRA program.

KEY BENEFITS OF THE TRA PROGRAM

COMPETITIVE ADVANTAGE

Formal training in consultative, diagnostic sales and risk advisory skills gives you a distinguished brand and competitive advantage in the marketplace.

CERTIFICATION

Demonstrates that you have the risk advisory knowledge, skills, tools, and process needed to successfully identify, analyze, and mitigate risks and exposures on your client's behalf.

PERFORMANCE

Trusted Risk Advisors™ build high-trust client relationships that are strong and enduring, regardless of the market. The TRA mark demonstrates that you are skilled at reducing claim frequency and severity.

WHO SHOULD ATTEND?

This program is designed for seasoned, successful agents and brokers who want to take their game to the next level — to reap the rewards that only credibility, trust, and enhanced perception can bring. Although at least one year of industry experience is recommended, consideration will be given to professional experience outside the industry.

To earn the certification, you must complete all four sessions of the Trusted Risk Advisor™ program in order. Agents who complete the Trusted Risk Advisor™ program are granted a lifetime certification.

This program will be led by Matt O'Neill, a Beyond Insurance master coach and in-demand speaker/trainer. The TRA program is based on the process that enabled thought-leader Scott Addis to achieve a $12 million revenue book with a 95% hit ratio.

Attend from the MAIA headquarters in Milford, MA, for the live, classroom program.

About the TRA Program

TRA 1:
May 13, 2025

GOODBYE, AGENT AND BROKER. HELLO, TRUSTED RISK ADVISOR™

- Discover Your WHY…Your Purpose for Existence
- Your Path to Trusted Risk Advisor Status
- Differentiation, Commoditization, and the Traps
- Developing a Unique Message – Your TRA Value Proposition
- Risk, Risk Management, and the TRA Decision Matrix

TRA 2:
May 14, 2025

THE ART AND SCIENCE OF DISCOVERY…LEADING TO STRATEGY

- The I³ System
- The Five Stages in the Initial Prospect Interview
- Walk Away Power
- The Employee Interview…a Strategy to Position You as the Undercover Boss!
- Case Study: Hospitality Industry
- The TRA Prospect Trigger…Emotion
- Active Listening
- The Prospect Qualification Filter

TRA 3:
June 10, 2025

THE RISK ADVISOR – MOVING AWAY FROM THE TRANSACTIONAL SALE

- The Underwriter's Response to the TRA Process
- The Art of Negotiation
- Prospect Research Evaluation Program (PREP)
- Filling the Prospect Pipeline
- The World of the CFO

TRA 4:
June 11, 2025

CREATING A DIFFERENTIATED CUSTOMER EXPERIENCE JOURNEY THROUGH THE TRA PROCESS

- The Customer Experience Journey
- Monitoring Risk and Risk Management within the TRA Framework
- Building Relationships that Last
- Creativity and
- Innovation…the One-Two Punch of the TRA
- The Art of Goal-Setting
- Living Each Day as a Servant Leader!

Matt O'Neill, CRA, ACRA, ACXS, TRA, ASA
Master Coach

When he's not training and coaching, Matthew O'Neill serves as the Chief Experience Officer of CX Synergy and Director of Customer Experience for GMG Insurance.

For more than ten years, Matt has worked with small, regional, and national organizations and associations to improve customer satisfaction, loyalty, and improve the employee experience. Matt focuses on transforming the customer experience journey, from brand awareness through sales and service, to drive growth, increase customer lifetime value, and create lasting brand loyalty.

As Director of Customer Experience for GMG Insurance, Matt analyzes stakeholder engagement with the brand, both online and in-person, and works closely with all departments to deliver training and education on "predict and prevent" risk mitigation strategies and tactics. He also acts as a risk advisor, supporting the implementation of the GMG Advantage process for prospective and current clients.

Prior to GMG Insurance and CX Synergy, Matt spent more than a decade as a master coach and consultant for Beyond Insurance teaching independent agencies and carrier organizations how to apply a powerful diagnostic, consultative risk management process.

Today, Matt is recognized as one of the top-rated speakers/trainers for Beyond Insurance. Matt brings his expertise to the forefront, specializing in the strategic use of social media for effective prospecting and selling.

He provides training to accelerate growth, increase new business production, and develop high-performing agents, brokers, and carrier teams. He is the author of *A Journey to CX Synergy*, a monthly LinkedIn newsletter focused on enhancing industry perception and credibility using customer experience strategies.