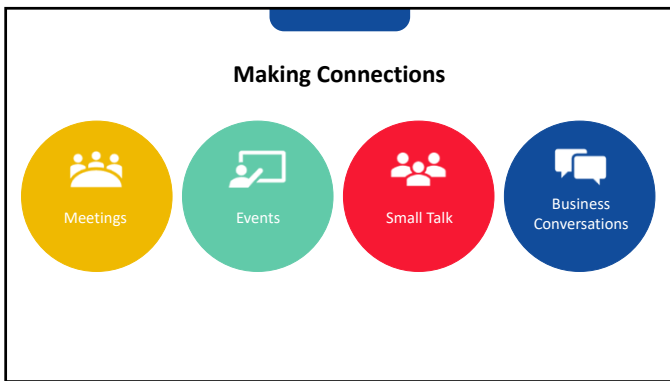




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2



3

How Can We Remedy?

- ~70–71% of meetings are considered unproductive or ineffective
- Only about 30% of meetings are seen as effective (meaning ~70% fall short)
- Some studies estimate around 35–50% of meetings are a waste of time



4

What are the Most Common Flaws in Meetings?



5

What are the Most Common Flaws in Meetings?

1. No Clear Purpose	6. No Leader or Ownership
2. No Defined Outcome	7. Poor Preparation
3. The Wrong People in the Room	8. Dodging the Real Issue
4. No Agenda	9. Should This Really Be a Meeting?
5. Monologue, Not a Conversation	10. No Follow Through or Next Steps

6

Anonymous Confessions of Bad Meeting Behavior

No names, identities, companies

Focus on the behavior that made you flinch, gasp, shocked you, immediately react!



7

There are More! Things We Also See and Hear!

Interruptions!	Talking Over Someone	Monopolizing Conversations	Being Too Loud
Showing Up Late	Ignoring eMails	Gossiping	Fidgeting
Phone	Personal Space	No Eye Contact	Side Comments or Muttering Under Their Breath

8

The Power Position in the Meeting

- Be the most prepared person in the room
- Be sure to speak early and contribute
- Demonstrate clear and concise language
- Frame and propose direction
- Ask questions



9



The Power Position in the Meeting

- Control your presence
- Value not volume
- Acknowledge and align with others, strategically
- Be comfortable with silence
- Conclude with direction

10


How Would You Open This Meeting?

1. Meeting to discuss trends (within your sector) that will impact upcoming business.
2. Meeting 100+ days prior to a complex renewal; this is the initial meeting.
3. Meeting to convince the other party that your proposed insurance program is the most ideal path ahead.
4. Meeting to share difficult news that you cannot write the account.

11

Networking Best Practices

- Know Your Audience
- Set a Goal to Get Yourself Out There
- Be Authentic
- Aim to Build a New Connection
- Be Present and Engaged
- Learn Something From Others



12



Conversation Starters

- "I noticed we are both in the same ... (Industry/position/ specialization). Are you experiencing (blank)?"
- "I heard someone mention (topic of interest). Have you had any recent experiences or insights related to this?"
- "What's something interesting your team is working on right now?"
- "What's been the biggest shift you've seen in the business this year?"
- "What are your thoughts on (recent industry headline)?"

13

AIM

Audience: Who are you working with?

Impact: What difference do you make?

Moment: Create a connection.



Instead of:

- "I'm an underwriter at ABC Company."



Try:

- "I work with clients who are navigating (complex) risk decisions, and I help them structure coverage that actually fits how their business operates. What kind of challenges are you seeing right now?"

14

How Do you Move On?

"It was great to meet you. I would like to reconnect and continue our conversation."

"I am headed to get a water/refill. Would you like to join me/need anything?"

"It was really great meeting you. I'm glad we connected on [topic]. I'm going to circulate a bit, but I hope we can stay in touch."

"Have you met [Name]? I think you two would really enjoy connecting..." (make intro)

"I'd love to continue this—could we connect on LinkedIn or grab time another day?"



15

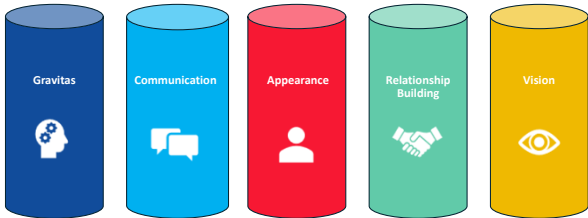
Let's Have Some Fun!

Introduce Yourself – Give Your Introduction! Share an interesting fact or a brand signal about yourself and your role. **Follow the rules below:**

- No title
- No tenure
- Use unique descriptive words – avoid general descriptions
- Do not go longer than 25-30 seconds

16

Executive Presence



17

Meetings Over Lunch or Dinner

- Arrive early, greet the client
- Start with light, professional conversation
- Focus on building rapport
- Weave in business naturally (70% relationship/30% business)
- Be attentive to details
- Stay engaged



18

Meetings Over Lunch or Dinner - Caution



- Manage alcohol – You are always on!
- Avoid controversial topics
- Do not pitch
- Handle the bill smoothly
- Close with intention and appreciation

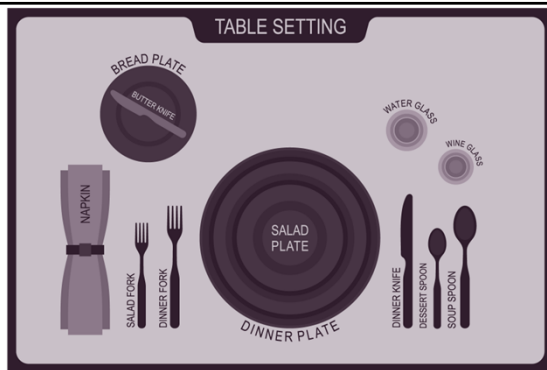
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Dinner Scenario Roleplays



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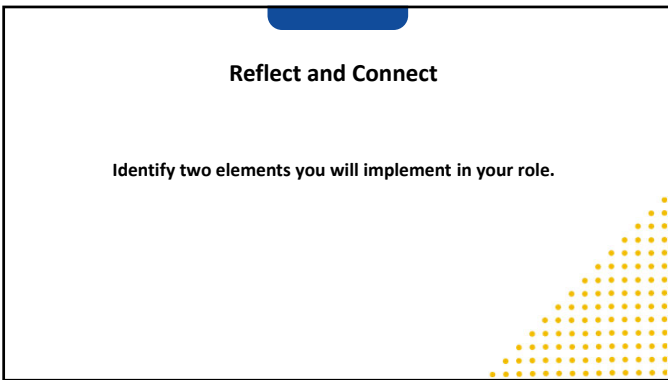
TABLE SETTING



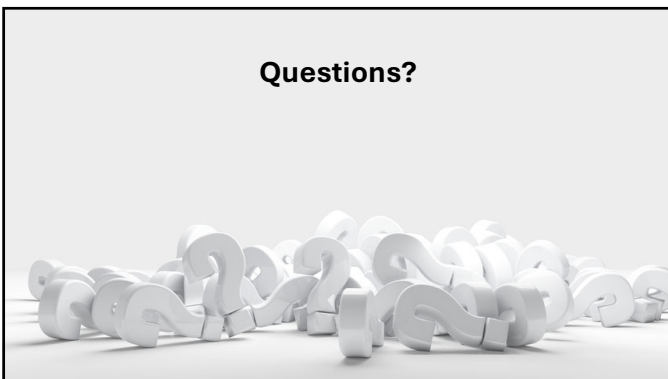
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The slide features a blue background with a white top section. The logo 'NEW LEVEL PARTNERS' is centered in the white section. Below it, the text 'Learning Solutions for the Insurance Industry' is centered. The website address 'www.newlevelpartners.com' is centered below that. At the bottom, the text 'Connect with us on LinkedIn!' is centered. The bottom corners of the slide are decorated with a pattern of small dots, transitioning from blue on the left to yellow on the right.

25
