

# 2025 ADVANCED SALES FORUM

*Explore, Inquire, Innovate*

## Practice Management: Sharing Tools for Success



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# Keeping Current in an Ever Changing World

# Question 1

Discuss some of your favorite designations, career or knowledge enhancement courses, or certifications.

Are there any that have been the most applicable to your day-to-day work?

## Question 2

What publications, podcasts, or media do you consume regularly to keep pace and/or enhance your knowledge?



# Incorporating Technology

# Question 3

We can't avoid it – let's talk about AI!

- How has AI impacted your work?
- Are you using it in your practice?
- What is your company's opinion of AI?
- Do you have any AI best practices or a favorite platform? (e.g. ChatGPT, Copilot, OpenAI)

# Question 4

What other technologies are you employing on a regular basis?

(And we don't mean Microsoft Office!)



# Measuring Success

# Question 5

Measuring success can look different to everyone.

- Leaders, how do you measure success for your teams?
- Individual contributors, how do you measure success, especially during annual reviews?

# The Competitive Edge

# Question 6

Do you consider yourself a salesperson or a strategic partner who brings added value?

What is your company's perspective on Advanced Sales? Is it integrated within the sales and distribution team?

# Extra: Training and Development

# Question 7

Let's talk about recruiting new talent...

- What are some nonnegotiable/required skills?
- What are some preferred skills/nice-to-have qualities in a candidate?
- Do you find any of these particularly difficult to find?  
Are there any challenges when working with corporate recruiting teams and how have you overcome them?

*\*For individual contributors: what qualities do you believe set you apart in the recruiting process?*



## Question 8

What is the most important element to you in retaining employees or when considering whether to make a career move or stay with your company?

# Thank You

