



Practice Management Best Practices

Audience Participation Session

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01

What's one thing you have read, watched, or listened to in the last month that changed how you do your job — or that you immediately shared with a colleague? Tell us why it stuck.

02

What's a tool — beyond the obvious Office stuff — that you'd genuinely recommend to this room? Bonus points for something you stumbled onto by accident that you now can't work without.

03

Show of hands — who's using AI weekly? Now tell us about one task where it's genuinely saved you time, and one where it let you down. And has your firm given you actual rules yet, or are we all still freelancing?

04

What recent or pending regulatory and tax changes are most reshaping how you advise and position your work — and how do you translate them into something actionable for your sales partners and clients?

05

What's the one skill or quality you've learned you can't train — the thing a candidate either has or doesn't? And where do you keep getting stuck: finding that person, or getting them through corporate recruiting? (Individual Contributors: what do you think tipped the hiring decision in your favor?)

06

When you bring someone new onto your team, what's the one part of onboarding that accelerates them — and the one gap you find yourself filling manually every time? (ICs: one thing about your training that genuinely helped, and one you wish someone had done for you.)

07

What's one thing you've deliberately stopped doing this year to protect the work that matters? And how did you sell that 'no' to your boss?

08

Think of the last time you had to explain something technical to a skeptical stakeholder. What did you say or show to make it click? Give us your go-to analogy or opener.

09

You're in a budget or headcount conversation and someone asks, 'but what does your team actually produce?' How do you answer when the value is relationships and influence, not a number on a sales report?

10

Advanced Sales teams increasingly span four generations. How do differences in working style, communication preferences, and technology comfort show up on your team — and what have you found genuinely works to bridge them?

11

Think about a time you chose to stay somewhere — or chose to leave. What was the deciding factor when it came down to it? And what's the one thing keeping your best people from walking?

12

Let's normalize learning out loud — small misses count. Share one deal, hire, or call you'd run differently today, and the one thing it taught you.

13

If you could tell a new Advanced Sales professional to invest in one skill for the next five years, what would it be — and what are you personally doing right now to build it yourself?

Thank You

