Q4i Friendor Program

Become an active member of the Goose community!

ENGAGEMENT HANDBOOK

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What's Included?

Access to Goose

We invite you to join our agencies in the Goose community and online platform. We'll provide two logins to Goose, providing access to the Activity page, Dashboard, Vendor Hub, Solutions Group, Friendor Group, MORE Sales Training: Core Components course, and invitations to online and in-person community events, such as Q4Live (travel and conference expenses are additional).

Vendor page

Create your own home base in Goose to introduce yourself and let the agencies learn about you on their own timeline. Tell your story so they know who you are, what you do, and how you help make them a stronger advisor.

You provide content for the page; we will upload it. Offer as much information as you'd like to build your case and connection. Submit your content using the **Submit content** button in the Friendor Group.

Content formats accepted:
- Copy
- PDFs
- Images
- Videos (hosted videos and .mp4 files)

Referral discounts

Engaged producers and agencies are the lifeblood of Goose and our Friendor relationships. We engage with Friendors who are committed to helping build the Goose community for the momentum of mutual benefit.

Nominate producers and agencies who would benefit from Goose and receive a credit on your Friendor membership fees. There is no limit on the number of credits you can accumulate.

Promotions

We strive to mutually support our Friendor relationships and provide various methods of exposure to our Goose audience and larger readership.

We will publish a press release about your company joining the Goose community and add your logo to our website in a carousel of Friendors. We are open to other joint promotional ideas and may initiate such opportunities and are open to participating in ones you initiate. Let’s chat!

Host an educational event

Present an educational session focusing on your expertise and the agency’s needs and interests. Leverage the opportunity to establish your organization as a trusted resource and partner. The session may be for Goose members only or livestreamed on LinkedIn.

Ad placement

We place rotating ads for Friendors inside Goose and on our external communications such as blogs, emails, and newsletters. We can design the ads for you, or you can design them and submit your artwork.

See page 4 (**Ad Specifications**) for further details. Please note there are two ad sizes and specifications for each.

Solution Worksheet

Complete a Solution Worksheet providing detailed positioning information about your services. This positioning information will help our member agencies successfully incorporate discussions about your services into the consultative sales process we teach, the MORE System.

See page 7 (**Solution Worksheet**) for further details.

Friendor Mini-Course

Create a short "how to use our services" video course that you film, and we produce and host. This course builds on the information you provide in the Solution Worksheet. It is designed to expand your exposure by reaching our brokers through the Courses section of the Goose platform and providing them with a comprehensive view of your solution.

See page 8 (**Friendor Mini-Course**) for further details.

Your Instruction Manual

Friendor Content Guide

- Ad Placement & Design Specifications
- Solution Worksheet
- Friendor Mini-Course
- MORE System Videos to Watch

Ad Placement & Design Specifications

We will place ads for your company in two locations that will rotate with other Friendor ads:

- Our Industry Blog: You provide the link for where you would like the viewer to go when they click the ad.
- Goose: We link the ad to your Vendor Directory page within Goose.

See the specifications and example graphics below for ad creation. Submit ad information or publish-ready artwork through the **Submit Content** button in the Friendor Group.

You can choose to have Q4i design your ads or design them yourself and provide the publish-ready artwork. See options 1 & 2 below.

Option 1

Have Q4i design your ads. Please provide the following:

1. **Logo** (all versions)
2. **Color palette**
3. **Content and design elements** you would like in the ad (Headline, call to action, etc.). Note if you would like us to create the copy headline.

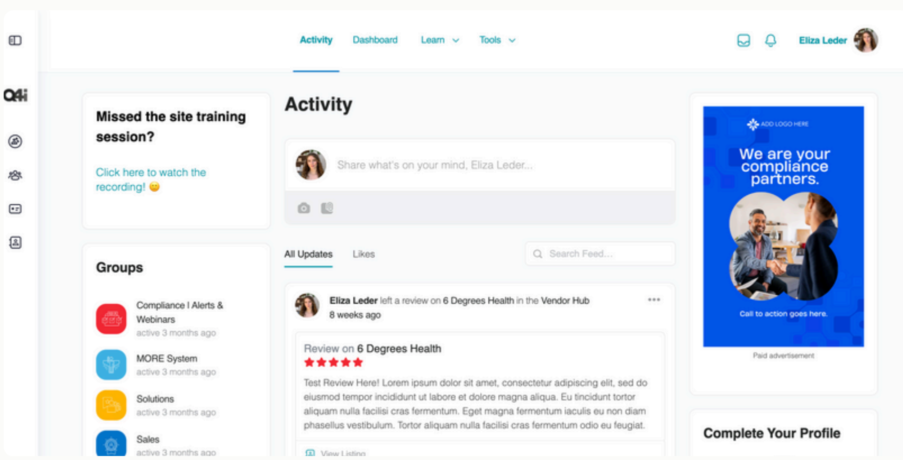
The designs on the following pages are examples. Each ad we produce is unique, and we'll only use these designs as a guide.

Option 2

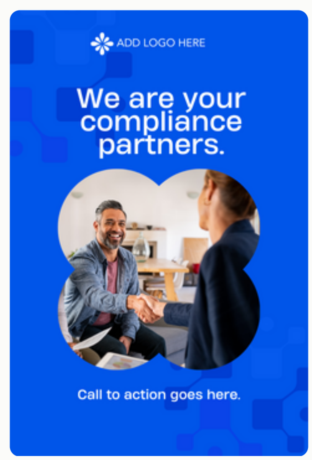
Design your own ads. Please follow the guidelines for Goose ads:

1. **Dimensions**: 800px x 1200px
2. **Colors**: Choose high-contrast colors behind text for legibility.
3. **Text size**: No smaller than 24pt font. Keep the text minimal for legibility.
4. **Logo**: Ensure your logo is included in the design.
5. **Link**: We will link users to your Vendor Directory page.
6. **Call-to-action language**: Provide a single call to action.

Examples



Ad Placement



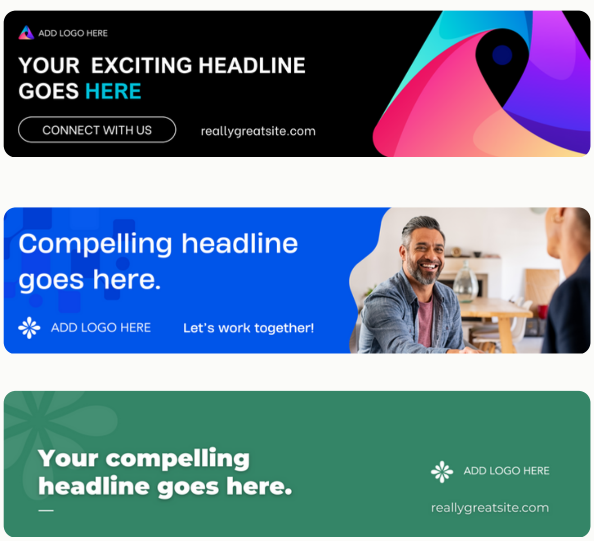
Example Ad

Option 2 – Continued

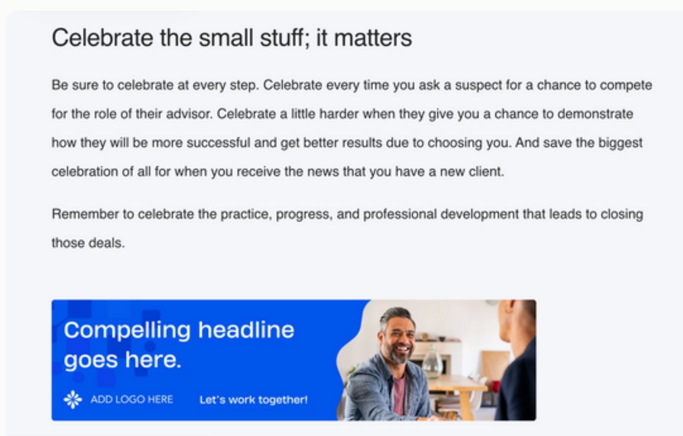
Design your own ads. Please follow the guidelines for Industry Blog ads:

1. **Dimensions**: 3600px x 900px
2. **Colors**: Choose high-contrast colors behind text for legibility.
3. **Text size**: No smaller than 18pt font. Headlines should be in approximately 40pt font. Minimal text for legibility.
4. **Logo**: Ensure your logo is included in the design.
5. **Link**: Provide the link for where you would like the ad to direct users.
6. **Call-to-action language**: Provide a single call to action.

Examples



Example Ads



Ad Placement

Solution Worksheet

You are invited to complete a Solution Worksheet detailing information about your services.

The worksheet aligns with the MORE System, the sales process we teach advisors.

The worksheet provides the advisor with valuable information about your service to help them:

- **Prepare for a sales conversation**
- **Know how to identify when a buyer needs your service**
- **Understand how to effectively position your service to the buyer**

Download the Solution Worksheet and fill in each area with as much detail as would benefit the advisor. Create as many worksheets as are applicable to your solutions.

Submit completed worksheets through the **Submit content** button in the Friendor Group. We will review and provide feedback to help you maximize the benefit of your content.

When finalized, we will transfer the content into a MORE System branded PDF document and place the file on your Vendor Directory page in Goose for agencies to download.

Friendor Mini-Course

You are invited to create a short “how to use our services” video course that you film and we produce and host.

The course will allow you to present your solution to our community of employee benefits advisors and educate brokers on how to best sell and implement your solution using our consultative sales process, the MORE System.

The purpose of the course is to provide advisors and their service teams with enough information and details to understand what you do, why you do it, and how you do it. It also provides them with training for team members and reference tools when preparing for sales meetings.

What you do: Film four videos and send us .mp4 files. Submit videos through the **Submit content** button in the Friendor Group.

What we do: Edit and finalize the videos and then host the course on Goose for all members to access.

- Film using Zoom, Zoom clips, Vimeo, or Loom on desktop or phone.
- If you film from your phone, film horizontally.
- If you have an external microphone, use it.
- Have white or natural bright lights facing you behind the camera.
- Download the video and send the raw .mp4 file to us. We will do the editing. 🙂

Mini-Course Outline

Use these videos to bridge a connection with the agencies. Let your personality come through so the viewers feel they know you and are ready to do business with you!

Video course outline, including suggested times for each video:

VIDEO 1 3 - 5 minutes

The problem your product or service solves for the client and how you solve it

The purpose of this video is to introduce the advisor to your services and set the stage for who you are and what you do.

Give a basic explanation of your service, who the intended audience is, and how they benefit from implementing it. Consider offering examples of the type of clients who thrive with your service and those for whom you're not a good fit.

VIDEO 2 5 - 10 minutes

Case studies and success stories

The purpose of this video is to build the case that your service is valuable. Use social proof to help advisors get comfortable with your offering.

Share case study examples of how you work with clients and how they benefit from working with you. If you share multiple case studies, provide a brief agenda at the beginning.

VIDEO 3 10-15 minutes

How to talk about, position, and execute your solution within the MORE System

The purpose of this video is to help the advisor become more familiar with your solution and how it fits into the scope of insurance and non-insurance solutions they are proposing to prospects or clients. Use this video to connect with them as a colleague, offering guidance to help them improve their sales conversations.

Walk through your Solution Worksheet(s). Use the information you've already organized for the worksheet and turn it from words on a page into a conversation with a peer. Provide commentary and insight for using the worksheet information effectively in the MORE System. Offer any additional explanation you want them to know that isn't included in the Solution Worksheet(s).

If you have multiple solutions and worksheets, you may film one video for each or combine them into a single video. Decide how the information would be best presented to the advisor.

VIDEO 4 5 - 15 minutes

How to effectively implement the solution

The purpose of this video is to help the advisor and account manager visualize themselves successfully implementing your solution. When they know the end game, they are more likely to talk with you.

Outline the recommended steps the agency will take to start implementing and using your solution.

- Share a high-level description of implementation the advisor can share with the buyer. What will happen from the buyer's perspective? What does the buyer need to know and be prepared for?
- Follow with detailed instructions for what the agency and your company will do during implementation. Who does what? Is this something agencies do on their own, or do you work together? Let them feel confident about implementation.

Outline marketing resources, support, suggested campaigns, etc. Offer any ideas or resources you have for engaging the employer and employees with your services.

If you have success metrics, share them here. For example, people who set up their profiles within the first 7 days are 75% more likely to engage with the service. People who don't log in within 7 days will likely never use the service.

MORE System Videos to Watch

To best create content for your video course, we highly recommend watching a handful of our MORE System training videos to familiarize yourself with the consultative selling process and how and where your solution fits into it.

The following MORE Sales Training videos will help you understand the components most important to success in your own course.

Introduction to Solutions (5:47)

A High-Level Overview of the MORE System (15:10)

Role Playing of Strategic Analysis (13:35)

Role Playing of Strategic Alignment Plan (11:46)

Solution Worksheets (4:53)

Filling in the Strategic Analysis Document (5:37)

Filling in the Strategic Alignment Plan Document (5:57)