Challenge Yourself, and Celebrate the Victories

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I entered the employee benefits industry in June 2017 as a group health and dental advisor without any formal background or relevant experience with proposing or implementing health and dental plans. I come from a sales background, and I knew that if I wanted to succeed in this industry and get ahead of a steep learning curve, I would need to surround myself with the right material and professionals in order to succeed.

Unfortunately, there was not a robust training program available to me when I started. I took it upon myself to research different courses and designations that would not only be relevant but also would help me stand out in a sea of benefits professionals. I was very fortunate to have support from my management team, and I enrolled in the new CEBS program.

I have always been a self-starter, so I decided to go with the self-study route. It certainly helped that my wife was studying for her M.B.A. degree and CFA Level III exam at the same time. Studying was a natural part of our routine. I would come home from work and read the course material on a regular basis, either at the gym or in the hours before bed. As an exam date approached, I would utilize the practice exam about a week before the scheduled date. For me, this was a winning formula because it kept the material top of mind on an ongoing basis, and the practice exams gave me a window into the types of questions that would be asked and the types of answers that would be expected.

I set an aggressive goal: Every two to three months for the next year, I would enroll in a new course, schedule the exam straight away and immediately start to prepare and apply the knowledge I was learning. Once the exam was complete, I would be on to the next course. I completed my first exam in December 2017 and my last exam in November 2018. I loved that the GBA and RPA designations were checkmarks along the way. It helped to fuel my motivation, and there is a direct correlation: An increase in knowledge (and confidence) leads to an increase in sales volume and ability to service my clients.

Within six months of receiving the CEBS credential, I was promoted from a group health and dental benefits advisor working solely in the city of Toronto to a senior group benefits specialist with a national territory. One day that stands out in my mind is getting my new business cards delivered to me with the CEBS designation after my name. It’s a constant reminder of all the hard work it takes and a proud moment each time I hand them out.

Fast-forward, and I attended the Symposium in New Orleans, Louisiana in September 2019, almost ten months after receiving my CEBS designation. This was the perfect setting to network with like-minded professionals and attend top-of-the-line sessions in the health care, retirement and Canadian topics. The standout sessions, in my opinion, discussed behavioral economics, employee communication and wellness programs. But perhaps the most important reason to attend the Symposium was to celebrate with my peers.

During the Symposium I explored the city of New Orleans on Saturday night and Sunday morning (including a swamp and bayou tour!); attended the First-Time Attendee Luncheon, Conferment Ceremony and Conferment Reception; and filled my days with impactful educational sessions. In addition to that, there was no shortage of roundtable discussions and sign-and-dine dinners to attend. Whether you are a new grad, you are just starting the process or you’ve had your designation for years, I urge you to attend and take advantage of all that the Symposium has to offer.

My biggest piece of advice surrounding the CEBS designation would be to enroll in the courses and set your exam date immediately. Hold yourself accountable. Challenge yourself to do more than you thought you could, and celebrate the small victories. Whether it takes you one year or five years to finish, you’re accomplishing something few people ever accomplish, and you’ve got a network of professionals to help you along the way. The knowledge and distinction that come with the CEBS designation have been truly invaluable to me two years into this exciting career, and I’m excited to become an ISCEBS Fellow in 2020.

See you in San Diego for Symposium 2020!