PACESETTER - THE MANAGEMENT SKILLS SEMINAR FOR A NEW GENERATION

You have so many tasks and responsibilities to perform as a manager. You must manage your time effectively; plan for and run your team to optimize its performance; and recruit and select new agents while retaining and developing your current agents for long-term profitability!

This four and a half-day seminar focuses on improving manager performance in today's environment and developing critical management skills for those in their first two-years.

The seminar will help you:

- Construct and implement an agency action plan
- Improve recruiting techniques and results
- Formulate better selection practices, processes, and tools
- Enhance agent training and development
- Determine what motivates agents to help them improve job performance and accountability
- Set performance standards to manage effectiveness and efficiency

Who should attend?

Sales managers, unit managers, district managers and agency manager who are in their first two-years of their management career who have previous experience as an agent and want to orient themselves with the skills and processes necessary for successful management of their organizations.

Course Overview

Pacesetter's seminar covers the processes of successful sales management; broken down by subject area. Each day focuses on developing critical skills for an area and reflecting on building upon skills learned and practiced in the previous days. All content is based on LIMRA research and best practices of the best sales managers, globally.

Pre-Seminar Assignment

So you get the most real-life benefit from attending the seminar, you need to come prepared. You will complete an Agency Profile form, outlining your current agency recruiting, retention, and productivity statistics, your agency training curriculum, and what major challenges your agency or team will be facing in the coming years that need to be planned for so you're ready to hit the ground running when Day 1 begins.

Day 1: Planning and Goal Setting

You will learn general information about the Pacesetter seminar before turning your focus to agency management responsibilities for operational planning and organization. It begins with the Management Process; progress into management job activities and identify the differences between current costs and capital investments, before the serious work begins in planning and problem solving. The afternoon finishes with time management, delegation strategies and defining an agent's job description to prepare you to recruit and select the right agent talent.

Session 1.1 Welcome and Introduction

This general session will review seminar mechanics, procedures, objectives, and background information about LIMRA. Participants will be asked to analyze forces and issues that may impact the goals and initiatives their organizations may face over the coming years. The management process will be introduced and discussed, building the foundation for the seminar layout.

Session 1.2 Management Job Activities

In this session, participants will discuss the most important management job tasks—versus tasks performed most frequently. Critical manager knowledge, skills, and ability dimensions will also be discussed.

Session 1.3 Current Costs and Capital Investments

The session defines the concept of long-term investments, which will be introduced through a description of current cost versus capital investment.

Session 1.4 Planning and Problem Solving

Participants will be able to describe the planning process, successfully apply the process, and analyze their agency's strengths, weaknesses, opportunities, and threats (SWOT).

Session 1.5 Time Management and Delegation

In this session, participants will be able to explain time management principles, and evaluate time allocation for important tasks. Brainstorming about common "time robbers" and potential solutions will be conducted. Managers will be encouraged to establish a time control system in their agencies or teams that include standards, measurements, and evaluation criteria.

Session 1.6 Defining What An Agent Must Do

The importance of a concise agent job description will be introduced. This session also emphasizes using the job description to determine appropriate agent behaviors, levels and evaluation standards to identify the right candidate for the job.

Day 2: Recruiting and Selection

In the next phase of the management process you will begin using past agency performance to set your agent and production planning objectives before looking at various recruiting methods, selection concepts and tools to support you with identifying and selecting the right candidate. Day 2 concludes with creating your own Recruiting and Selection Action Plan for implementation upon your return.

Session 2.1 Agent and Production Planning (APP)

Participants will be given tools needed to plan production and agent hiring and retention requirements. Agent projections will be based on an analysis of past agency performance. This session also ties the Recruiting and Selection Action Plan and APP processes together.

Session 2.2 Recruiting Methods

Participants will learn the reasons for continuous and effective recruiting. They will also identify recruiting sources and create a performance based profile for the "ideal candidate." Recruiting formulas and techniques that outline characteristics of an ideal recruiting source and the advantages and disadvantages of each source will be examined. The session also introduces the Recruiting and Selection Action Plan and an exchange of new recruiting ideas.

Session 2.3 Selection Concepts and Tools

Participants will be asked to identify the "right kind of candidate" for their agency/team and a standardized process. Effective selection techniques and tools will be shown and discussed during this session.

Session 2.4 Creating Your Recruiting and Selection Action Plan

Participants will create a Recruiting and Selection Action Plan that combines the best practices and optimum techniques discussed in previous sessions.

Day 3: Developing Agents

Now that you have the right person recruited, how do you get him/her to be a productive agent? By applying the principles of adult learning and learning styles, you can implement your own training strategy to support the professional development of your agent team. Using the right "coaching" techniques will help ensure your agents are reaching their goals and achieving success. Day 3 ends with application of what you learned so far to analyze a fictional agency to create a multi-year plan for your agent's retention and productivity.

Session 3.1 Principles of Learning and Training

This session focuses on the principles of adult learning and how those principles are used to design effective training programs. The session also identifies obstacles to learning and best practices for agency training and training evaluation to determine results.

Session 3.2 Coaching and Improving Performance

Participants will be introduced to a process that can be used to identify the reasons for performance discrepancies (e.g., lack of skill or insufficient motivation). The LIMRA 5-Step Coaching Process will also be explained and practiced.

Session 3.3 Creating an Individualized Development Program

Participants will create a training program for one of their agents using both a sample case study and the process of diagnosis, objective setting, methodology and evaluation process (DOME). The result will be an individualized development program.

Session 3.4 Anytown Agency: Objective Setting

Participants will receive an agency case study to analyze. Working in teams, participants will start creating a multi-year plan as an exercise. The agency case study continues after this session as homework.

Day 4: Managing Performance

Creating your *New Agent 1st Year Training Action Plan* for developing your agents will be the focus this morning. Then, you will use a job performance model to determine what motivates your agents so you can properly support the coaching model as a performance management tool. The majority of Day 4 will be spent implementing the objectives and goals you created through your analysis of the Anytown Agency at the end of Day 3.

Session 4.1 Creating Your 1st Year New Agent Training Action Plan

Participants will use their knowledge of best practices from previous sessions to create a New Agent First-year Training Action Plan for their new agents.

Session 4.2 Motivating and Managing Performance

This session will help participants motivate those who work for them. A job performance model will be introduced and participants will discuss the importance of understanding what motivates someone. Participants will also rank and discuss their personal outcomes and primary motivators. The primary purposes of performance management and the elements of managing performance will be highlighted.

Session 4.3 Anytown Agency: Simulation

Participants will implement the business unit action plan for which they previously set objectives and goals. A thorough understanding of the agency operating details will be essential to properly implementing the agency plan. Participants will be evaluated based on the results of their objectives and whether or not the management principles discussed throughout the seminar were appropriately applied.

Day 5: Bringing It All Together!

What was the result of the Anytown Agency simulation? The morning of Day 5, each team will present their Business Unit Action Plan from the simulation exercise on Day 4. The large group will discuss what went well and what could have been improved. The seminar concludes with you evaluating the experience, reviewing the key points of the Management Process and your adoption plans, and next steps regarding the Post-Seminar Projects required for you to receive course completion status from LIMRA.

Session 5.1 Anytown Agency: Simulation Debrief

This session will combine all of the critical agency management elements and enable participants to reevaluate in their own operations. This session is also an analysis of the objective setting and the business unit action plan portions of the simulation. Participants will be asked to present and critique their results.

Session 5.2 Wrap-Up

This session concludes with a recap of seminar objectives and a participant summary about how to apply and maximize the techniques and processes presented. Closing remarks emphasize the implementation of processes, methods, tools, and techniques developed during the seminar.

Finally, post-seminar projects will be assigned and participants will be asked to evaluate the seminar relative to their initial learning expectations.

Post-Seminar Assignment

Within 30 days after the Pacesetter seminar, you will finalize your "draft" action plans - started during the seminar - to improve your recruiting, selection effectiveness, retention and productivity of your new agents. You will also focus on building strategies to implement the five key drivers of successful sales management. Upon completion of your projects, you will meet with your supervisor and obtain approval to implement your plans.

Post-Seminar Virtual Coaching Sessions*

Three Virtual Coaching Sessions will take place over the 90 days following the Pacesetter seminar to provide an opportunity to regroup with your fellow Pacesetter participants to share your progress with adoption of the course concepts and tools, to discuss your successes and challenges, and to reinforce your new skills. Each web-based session focuses on the work you have done in your post-seminar projects.

**For additional fee*