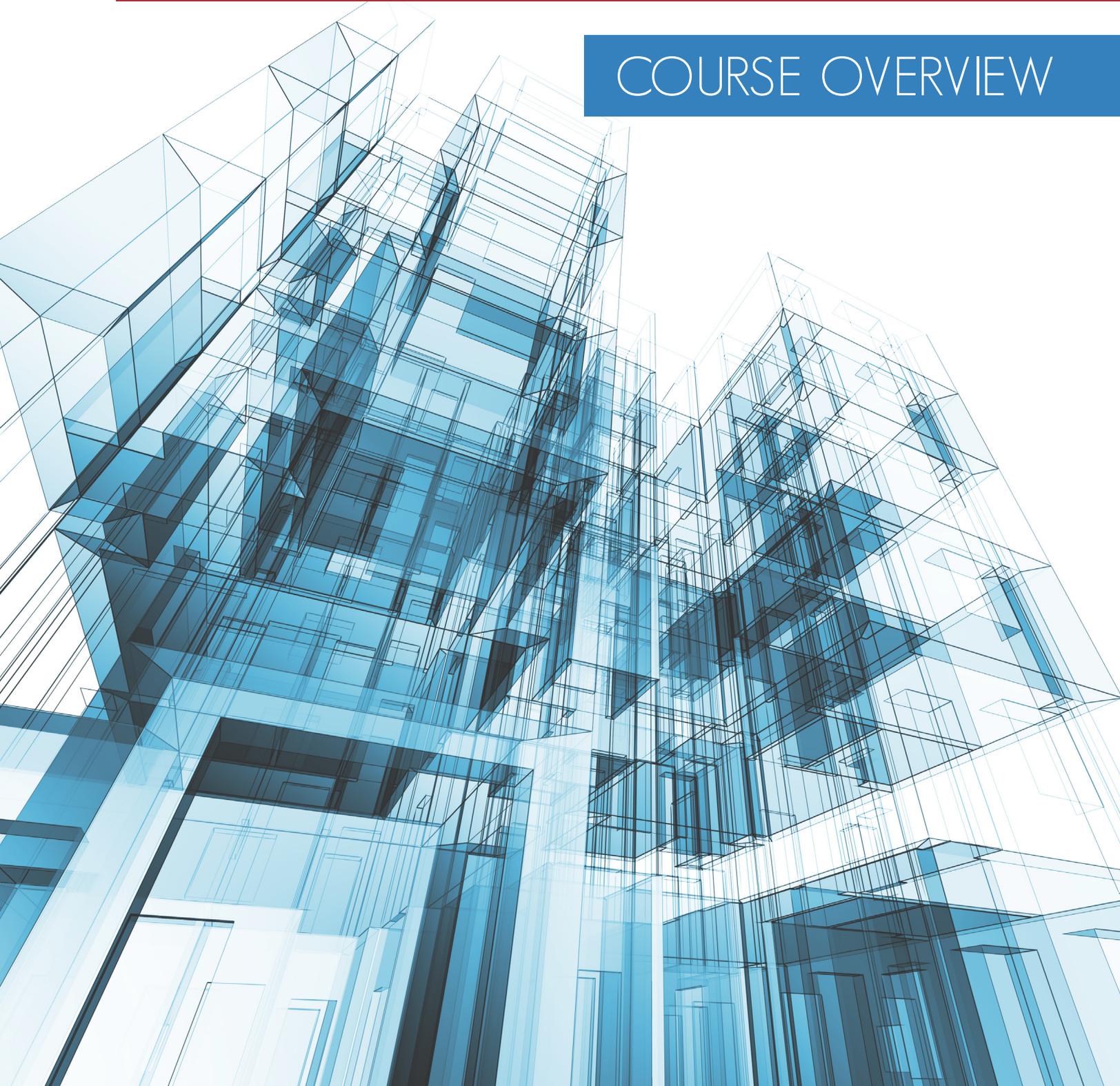


PROFESSIONAL PATTERNS OF EXCELLENCE  
*FOR SALES MANAGERS*

COURSE OVERVIEW



# WHY PPE?

## OVERVIEW OF THE PROGRAM

*Kinder Brothers International* has created a comprehensive training series that provides Sales Managers with the knowledge, attitude, skills and habits to achieve excellence in their leadership role. This role has a wide array of responsibilities. It can be challenging to stay focused on the high priority items.

Continuing our tradition of building confidence through competence, *Professional Patterns of Excellence (PPE)* will show Sales Managers the *why* and the *how* behind the critical functions and skills of their job. They will be better prepared to achieve excellence in every area of their role of developing people to be top producers.

The PPE is for Sales and Unit Managers at any experience level, whether a brand new manager in the industry or an established manager with a need to refresh and rekindle the core fundamentals of building a sales team.

## OVERVIEW OF THE PROGRAM

### Sales Managers Will Master These Critical Functions + Skills

- Understand and Embrace the Role of a Sales Manager
- How to Conduct an Effective Goal Setting and Action Planning Session with Agents
- How to Recruit Winners and Get Them off to a Fast Start
- How to Educate Agents
- How to Train for Maximum Impact
- How to Improve Production and Develop People during Performance Accountability Sessions

### Trainer's Guide

- Comprehensive including all script and activities to facilitate training
- Assessments and tools for measuring critical skill proficiencies
- Skill practices
- Pre-class, in-class and post-class assignments to ensure concepts and skills are not only understood but implemented in real-world situations
- Training would occur over an extended period of time
- Training will systematically focus on a topic, including the knowledge, attitude, skills and habits for that critical function

### Participant's Workbook

- A guide through the course for Sales Managers including the knowledge, attitude builders, skill builders, and habit builders necessary for excellence in critical functions

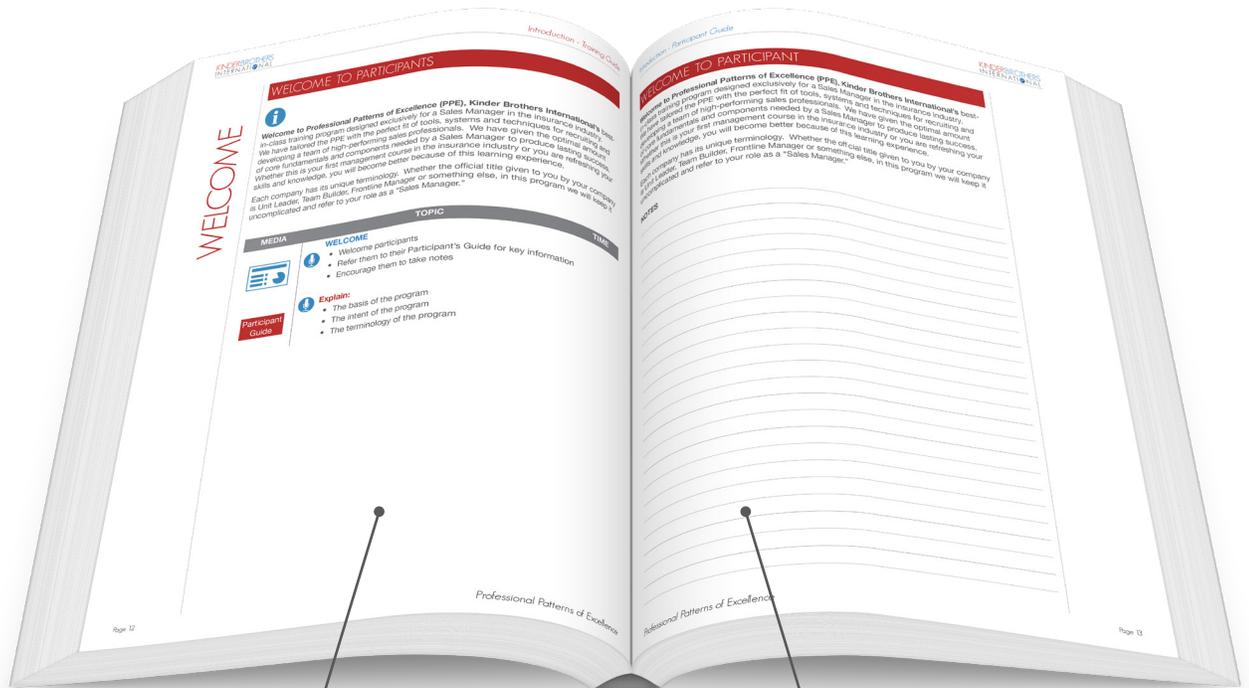
### PowerPoint

- Presentation for each session

# KEY TRAINING PIECES

OVERVIEW OF THE PROGRAM

SAMPLE TEXT



SAMPLE FROM TRAINER'S  
GUIDE  
Instructions For Trainer

SAMPLE FROM PARTICIPANT'S  
GUIDE  
Corresponding Participant  
Workbook Page

## OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

# 1

### Successful Managing

- Introduction to Management/Leadership
- Sales Manager's Roles
- Common Success Traits
- Know Your Priorities
- You Make the Difference

### Expected Outcomes

1. Understand that leadership is a part of the management job.
2. Understand the Sales Manager's role is to recruit, train, develop and supervise people.
3. Know the common success traits of managers and the six vitals for agents.
4. Know what green time activities are for the Sales Manager.

### KASH

<b>K</b> nowledge	Management is the accomplishment of predetermined objectives through others. Leadership is the ability to attract and retain talented and qualified people, create an environment conducive to personal growth and the growth of the entire team, and strive for improvement in an ever-changing environment.
<b>A</b> ttitude	You make the difference! You manage things, you lead people.
<b>S</b> kills	Time management is the skill that can make or break your career. Focus on developing this skill. Evaluate yourself according to the six common traits of successful Managers: Professional Presence, Building People, Self-organized, Systems Behavior, Mission Driven, Focused Activity. Continue to develop in these areas.
<b>H</b> abits	Stay in your green time activities: recruiting, interviewing candidates, evaluating candidates, commitment interviews, educating new Agents, joint work with new Agents, monitoring and measuring Agents' performance.

# SESSION OVERVIEWS

## OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

# 2

### Inspired Planning

- Communicate the Mission/Vision
- Sales Manager Planning Process
- Agent Planning Process

### Expected Outcomes

1. Have a general understanding of how important planning is to the overall success of the agency.
2. Know how to communicate the Agency Vision/Mission Statement.
3. Participate in a planning session for a Sales Manager.
4. Teach Agents how to plan for desired results.
5. Know how to gain a responsible commitment from Agents.

### KASH

<b>Knowledge</b>	Planning is the foundation for success. Every year, Sales Managers and Agents must participate in a formal goal setting and action planning session. Knowing the advantages of planning allows you to overcome the barriers to planning. When everyone, at every level of the company participates in annual planning, the entire organization is positively.
<b>Attitude</b>	The key to success in any business lies in deciding what you want to accomplish and establishing a plan of action to guide you. Planning is a great occasion.
<b>Skills</b>	Discipline is needed to complete the planning process for Sales Managers and Agents. Sales Managers set the example. Building relationships with Agents during the recruiting process, training and in planning sessions allows Sales Managers to gain responsible commitments from Agents. Establishing the Weekly Effort Formula is the high point in planning and is the time when commitments are agreed-upon.
<b>Habits</b>	Participate in the annual planning session for your agency. Require new and experienced Agents to complete a yearly plan, every year. Monitoring goals set through weekly follow-up meetings is a necessary discipline that helps Agents and Sales Managers reach goals. When goals are met, planning truly becomes inspiring and something people find valuable.

## OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

# 3

### Building a High-performing Team

- Recruiting Process
- Picture
- Locate
- Compare
- Sell
- Building Your Recruiting Reservoir

#### Expected Outcomes

1. Should know their recruiting numbers.
2. Should understand six vitals/other profile factors and how to score them.
3. Use the Interest-arousing Strategy.
4. Make initial contact with a key Agent.
5. Understand the Law of Three Interviews.
6. Conduct initial interview using six vitals/other profile questions.
7. Answer the questions all Agents have.
8. Use their Success Story.
9. Use the Improving Judgment Form.
10. Begin building reservoir to Top 25.

#### KASH

<b>Knowledge</b>	Recruiting is your number one job. Follow the process: Picture, Locate, Evaluate, Sell
<b>Attitude</b>	Recruiting high-potential individuals to your organization is a dynamic, ever-continuing and ever-challenging process. Essentially a creative function, it is motivated by ceaseless drive on your part toward developing a recruiting process that consistently attracts enough of the kind who stick and stay.
<b>Skills</b>	Evaluate candidates using the six vitals and other profile characteristics. Improve your judgment by grading candidates on these factors. Sell them in, sell them out, sell them back in. Deliver a powerful "Success Story". Attract a Key Agent. Build your reservoir to 25 using the four-way test.
<b>Habits</b>	Do something about recruiting every day! Cultivate your top 25 by making regular, planned contact.

# SESSION OVERVIEWS

OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

4

Implementing a Fast Start

- Why a Fast Start?
- Eight Fast Start Steps
- The Final Commitment Interview

Expected Outcomes

1. Understand why a Fast Start is critical for long-term success.
2. Commit to developing and following a set Fast Start strategy.
3. Be able to conduct the final commitment interview with the goal of gaining a mutual commitment to success, not just another new hire.

KASH

<b>K</b> nowledge	Believe in, master, and implement a set fast start strategy. The starting point is during your final commitment interview!
<b>A</b> ttitude	When you know Agents are being successful, your recruiting interviews will go better. It will show in your attitude.
<b>S</b> kills	Create your personalized fast start strategy or use the eight steps discussed today. Prepare your checklists and use them with every new Agent, without fail.
<b>H</b> abits	Developing the habit of using a fast start strategy takes planning and self-discipline. Work on this habit! Your recruiting will improve, thus making a positive impact on retention.

## OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

# 5

### Establish Working Right

- Agent Development is an Ongoing Process
- Knowledge – The Agent’s First Achievement
- Attitude – Develop and Maintain Right Attitude
- Skills – The Power of Working Right
- Habits – The Way in is Easy

### Expected Outcomes

1. Understand that helping Agents develop and maintain the right attitude is top priority.
2. Know how to build an Agent’s self-confidence.
3. Know the high-payoff activities for Agents.
4. Be able to teach Agents how to put in a good day’s work.
5. Help Agent’s develop good habits by the example the Sales Manager sets.

### KASH

<b>Knowledge</b>	Education takes place in the classroom; training takes place in the field, under live selling conditions. Developing Agents is an ongoing process; it’s never ending. Educate Agents on how to perform in their selling job. Teach them to educate themselves.
<b>Attitude</b>	Remember AFC – Ability – Future – Confidence. Feed this message to Agents. This is how you educate them on how to maintain the right attitude. Understand how to build up their self-perception and break down their perception of a task into doable components.
<b>Skills</b>	Knowledge gained in your educating system leads Agents to confident action. Confident action means that Agents know what their Green time activities are. They know the right activities; you have made them aware that together you will measure how they do these activities and if they are doing them often enough. Keep educating yourself in your management role and the necessary skills, as well as improving your selling skills. Demonstrate to Agents how to put in a good day’s work.
<b>Habits</b>	Be sure you are developing good habits; those you lead will follow your example. Remind Agents of the Common Denominator of Success: The secret of every successful person lies in the fact that they formed the habit of doing things that failures don’t like to do. Lead out in developing the 12 Habits of the Pros.

# SESSION OVERVIEWS

OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

6

Training and Development

- Training Objective
- Training Starts with Attitude Building
- Training the Planning Function
- Methods and Resources
- Training Salespeople to Sell
- The Most important Training
- Teaching the “How to”
- Selective Development – Going Beyond the Basics
- Monitoring the Training Function

Expected Outcomes

1. Understand that joint field work is the best training method.
2. Know how to conduct effective role plays.
3. Know how to conduct effective joint work.
4. Understand the necessity of using and teaching a set selling system.

KASH

<b>K</b> nowledge	One of the most important transitions for you to make as a Sales Manager is the change from being involved with prospects to becoming involved with Agents. As a Sales Manager, you have moved into the “people-building” business. <i>As a Sales Manager, a primary responsibility of your job is to assist your Agents in developing sales skills. It’s teaching them to become effective salespeople. It’s helping them learn how to build a clientele.</i>
<b>A</b> ttitude	You are demonstrating to Agents that your products can be sold, they can be sold in their marketplace, and they can be sold by them.
<b>S</b> kills	<i>Remember, education is what takes place in the classroom. Training takes place in the field under live conditions.</i> The best strategy for training Agents is joint field work using transferable strategies. Make your process so simple that when ordinary people follow it, they perform in an extraordinary fashion.
<b>H</b> abits	It is natural and healthy for your “controlling relationship” to change as the Agent grows in self-confidence and desire to operate independently. This feeling for independence should be encouraged. The Agent should learn to become self-reliant and self-motivated. <i>The change in the relationship should be gradual and guided by the results that are produced and the progress being made.</i>

## OUTLINE OF PPE SESSIONS FOR SALES MANAGERS

# 7

### Performance Accountability

- Introduction
- Sound Principles of Monitoring
- Why Measure Activity and Results
- Performance Evaluation and Planning Sessions
- Maintain Laser-like focus
- The Final Tests

### Expected Outcomes

1. Understand the job of monitoring attitude, skills, and habits.
2. Understand how to measure activity and results.
3. Commit to conducting effective Performance Evaluation and Planning Sessions.
4. Learn to use the Performance Improvement Formula with Agents.

### KASH

<b>K</b> nowledge	Monitor attitude, skills and habits. Measure activity and results.
<b>A</b> ttitude	Helping Agents maintain the right attitude, develop selling skills and good habits will positively impact their activity and results.
<b>S</b> kills	Weekly Performance Evaluation and Planning Sessions are an opportunity to work on selling skills, using role play or scheduling additional joint work activity. Follow a set pattern in these sessions.
<b>H</b> abits	Teach Agents to use the Performance Improvement Formula - $MxExA = FYCs$ . Check their progress against their Weekly Effort Formula numbers.

# SESSION OVERVIEWS

# A TRANSFORMATIONAL JOURNEY

START TODAY



## PPE BUILDS BEST-IN-CLASS LEADERS

- The job of management is a transformational journey.
- Professional Patterns of Excellence sets Sales Managers on the right path.
- More than just a one-time training course.
- Strategically designed to help Sales Managers develop a systems-driven mind-set that transfers to their jobs resulting in better retention and improved bottom-line results.
- Focus on fundamentals.
- Build a systems-driven culture.
- Transform your field management team into best-in-class leaders.
- Embrace the journey!

A TRANSFORMATIONAL JOURNEY

PROFESSIONAL  
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