

KINDERBROTHERS
INTERNATIONAL

Professional Patterns of Excellence
for Sales Leaders



OVERVIEW OF THE PROGRAM

WHY PPE?

Kinder Brothers International has created a comprehensive training series that provides Sales Leaders 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 Leaders 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 Leaders at any experience level, whether a brand new leader in the industry or an established leader with a need to refresh and rekindle the core fundamentals of building a sales team.

OVERVIEW OF THE PROGRAM

Key Training Pieces

Sales Leaders Will Master These Critical Functions + Skills

- Understand and Embrace the Role of a Sales Leader
- 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 Leaders including the knowledge, attitude builders, skill builders, and habit builders necessary for excellence in critical functions

PowerPoint

- Presentation for each session

OVERVIEW OF THE PROGRAM

Sample Text

Initial Interview - Skill Builder

The Initial Interview is important for uncovering a candidate's history and the thread of discontent. Know what questions you are going to ask to uncover the six vitals. (See the Job Aid, *Questions to Candidates to Uncover the Six Vitals*.) After the interview, take the time to grade the candidate on the six vitals and other profile characteristics. Remember TOD and DIL – what is their thread of discontent and do I like them?

NOTE TO FACILITATOR
You may choose to practice portions of other interviews. We have chosen to focus on the Six Vitals and Other Profile Characteristics. As time permits, work on areas you know will benefit your participants.

MEDIA
Audio / Video or Live Practice

TOPIC
Initial Interview – Skill Builder

TIME
30 minutes

MATERIALS
Job Aid, *Questions to Candidates to Uncover the Six Vitals*

PARTICIPANT GUIDE

INITIAL INTERVIEW – SKILL BUILDER

SAY: Now, let's take our interview tools and see how we use these.

CONDUCT | Skill Builder for Initial Interview.

- 1 Explain that in this activity participants will practice using the questions designed to identify the six vitals, and other profile characteristics.
- 2 Divide into groups of 3 – (Interviewer, Interviewee and Observer). Assign the groups questions or script to practice. Some practice using six vital questions, some practice using questions for other profile characteristics. There may be more than one group practicing the same thing.
- 3 Have them practice interviewing each other using the questions in the Job Aids section that correspond to their task.
- 4 As the interviewee, you can answer as you would in a real-world situation or provide answers you have found to be common. Or, get creative and make them up!
- 5 When you are the interviewer, jot down the score you would give the person on the vital or the other profile characteristic. You should form the habit of making notes during interviews. In a live situation, you would grade the candidate following the interview!
- 6 Tell them to discuss what they learned in the practice.
- 7 Debrief by asking participants to share what they learned in the activity.

BETTER PEOPLE. STRONGER TEAMS. A BRIGHTER FUTURE.

1

OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

Successful Managing

- Introduction to Management/Leadership
- Sales Leader'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 Leader's role is to recruit, train, develop and supervise people.
3. Know the common success traits of Leaders and the six vitals for agents.
4. Know what green time activities are for the Sales Leader.

KASH

Knowledge	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.
Attitude	You make the difference! You manage things, you lead people.
Skills	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 Leaders: Professional Presence, Building People, Self-organized, Systems Behavior, Mission Driven, Focused Activity. Continue to develop in these areas.
Habits	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.

2

OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

Inspired Planning

- Communicate the Mission/Vision
- Sales Leader 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 Leader.
4. Teach Agents how to plan for desired results.
5. Know how to gain a responsible commitment from Agents

KASH

Knowledge	Planning is the foundation for success. Every year, Sales Leaders 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.
Attitude	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.
Skills	Discipline is needed to complete the planning process for Sales Leaders and Agents. Sales Leaders set the example. Building relationships with Agents during the recruiting process, training and in planning sessions allows Sales Leaders 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.
Habits	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 Leaders reach goals. When goals are met, planning truly becomes inspiring and something people find valuable.

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OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

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

Knowledge	Recruiting is your number one job. Follow the process: Picture, Locate, Evaluate, Sell
Attitude	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.
Skills	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.
Habits	Do something about recruiting every day! Cultivate your top 25 by making regular, planned contact.

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OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

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

K nowledge	Believe in, master, and implement a set fast start strategy. The starting point is during your final commitment interview!
A ttitude	When you know Agents are being successful, your recruiting interviews will go better. It will show in your attitude.
S 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.
H 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.

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OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

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 Leader sets.

KASH

K nowledge	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.
A ttitude	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.
S kills	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.
H abits	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.

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OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

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

K nowledge	One of the most important transitions for you to make as a Sales Leader is the change from being involved with prospects to becoming involved with Agents. As a Sales Leader, you have moved into the “people-building” business. As a Sales Leader, 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.
A 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.
S kills	<i>Remember, education is what takes place in the classroom.</i> Training takes place in the field under live conditions. 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.
H 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. The change in the relationship should be gradual and guided by the results that are produced and the progress being made.

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OUTLINE OF PPE SESSIONS FOR SALES LEADERS

Session Overviews

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

K nowledge	Monitor attitude, skills and habits. Measure activity and results.
A ttitude	Helping Agents maintain the right attitude, develop selling skills and good habits will positively impact their activity and results.
S 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.
H abits	Teach Agents to use the Performance Improvement Formula - $MxExA = FYCs$. Check their progress against their Weekly Effort Formula numbers.

A TRANSFORMATIONAL JOURNEY START TODAY



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PPE Builds Best in Class Leaders

- The job of management is a transformational journey
- Professional Patterns of Excellence sets Sales Leaders on the right path.
- More than just a one-time training course.
- Strategically designed to help Sales Leaders 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!



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