

# Management Development Course Leading to **Chartered Financial Field Leader** for Managers Designation



PROFESSIONAL PATTERNS  
OF MANAGEMENT



“ Excellence comes  
when you ask  
more of yourself  
than others do. ”

# OVERVIEW

The life insurance market is well positioned for the future and will experience extraordinary growth for years to come. Dedicated to leveraging success in creating training solutions for unique marketplaces and cultures, Kinder Brothers International is the world leader in training and development from Agents to the Executive team. Structuring a sustainable agency channel is of paramount importance to life insurance companies.

Through many years of teaching best management practices to global clients, it is apparent that companies desire a proven, comprehensive, professional, and cost-effective method to train and develop Agency and Unit Leaders. Building and developing these leaders is Kinder Brothers International's signature strength.

Kinder Brothers International has 35 years of consulting, training and development experience with numerous top-tier world leaders and hundreds of thousands of managers worldwide, working with over 300 companies around the globe. Clients include: China Life, MetLife, AIA, Great Eastern, HSBC, ING, SunLife, Prudential, Allianz, AXA, Zurich and ManuLife.

Consultants within the Kinder Brothers International organization collectively have over 200 years of experience in the insurance and financial services industry. Kinder Brothers International Consultants have direct and successful insurance experience, thus creating the best training environment experience for each participant. Real-life experiences are shared, facilitated and emulated with the participants as a teaching tool. Consultants are also available for follow-up evaluations of the expected outcomes for the program objectives and results against business needs, processes and concerns.



# Professional Patterns of Management

Professional Patterns of Management (PPM) is a comprehensive training program for Sales and Agency Leaders, developing and advancing leaders to build and sustain agency growth. Kinder Brothers International's PPM has been incorporated as the training source into many companies around the globe. Successful results have been achieved by companies trained in the methodologies and techniques included in the program.

Professional Patterns of Management (PPM) offers these primary benefits:

- A single, trusted training partnership for sales management training – transferable, proven content
- Module format – easy to implement, train and follow up
- Reduced implementation time to capture a quick return on investment



## Professional Patterns of Management is for Agency and Sales Managers who seek to improve recruiting, increase productivity and build a sustainable sales force

Kinder Brothers International's Professional Patterns of Management (PPM) is a proven system for the development of managers. By any measure, Kinder Brothers International has successfully trained hundreds of thousands of managers worldwide. In today's highly aggressive financial services marketplace, sales management is key to success.

Professional Patterns of Management trains managers to:

- Select, evaluate and recruit high-potential agents
- Educate and train agents
- Communicate effectively
- Motivate agents
- Create a marketing culture in the agency
- Set agents up for early success
- Monitor and measure agent productivity
- Develop leadership skills
- Plan for agency growth



Since 1976, agency development has been Kinder Brothers International's sole mission. Sales management development is our signature strength.

# Module One—How Agency Leaders Think and Plan

**Essence of Module** - Develop skills in planning for desired results. In the process, it provides information relative to the management position - its responsibilities and expectations.

**Module Objective** - Challenges the Agency Leader to maximize personal development through a positive learning experience. Teaches a discipline model to plan the organization’s growth. Additionally, identifies four key areas that need time and attention.

| Key Concepts   | Tools Checklist  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>Philosophy Mission/Vision</li> <li>Agency Year-by-Year Model Agency Profile</li> <li>Procedures on Paper (POP) Management Accountability</li> </ul> | <ul style="list-style-type: none"> <li>Your Mission and Policy What is Planning?</li> <li>Planning Process</li> <li>59 Dimensions Agency Profile Business Self-Assessment Self-Analysis Questionnaire Success Model</li> <li>Sample Mission Statement</li> </ul> | <ul style="list-style-type: none"> <li>Organizational Chart/Traditional Life Agency Management by Objectives</li> <li>Total Sales Force</li> <li>Key Planning Questions Year-by-Year Model</li> <li>Twelve Disciplines Plus One Procedures On Paper (POP) Looking at the Major Systems</li> </ul> |

# Module Two—How Agency Leaders Recruit Winners

**Essence of Module** - Formulate a proven process for attracting, selecting, evaluating and inducting an adequate number of high potential producers each year.

**Module Objective** - Connects the direct relationship between recruiting and production, probing interview and develop persuasiveness in the presentation step.

| Key Concepts   | Tools Checklist   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>The Number One Job Basic Principles</li> <li>Searching Sources</li> <li>Structured Interview</li> <li>Candidates’ Five Questions</li> </ul> | <ul style="list-style-type: none"> <li>18 Factors Affecting Retention Who Succeeds Around Here? Ideal Profile</li> <li>Total Sales Force</li> <li>Pre-Approach Letters Evaluation Highlights</li> <li>Unlikely to be Successful Factors Recruiting Success Formula Commitment Interview</li> <li>Operation Fast Start</li> <li>New Producer Development Grid Model Joint Work Schedule</li> <li>Critical 90-Day Follow-Up Checklist Develop an Atmosphere of Success Induction Initiatives</li> <li>Develop Commitment Interview</li> </ul> | <ul style="list-style-type: none"> <li>Organizational Chart/ Traditional Life Agency Management by Objectives</li> <li>Total Sales Force</li> <li>Key Planning Questions Year-by-Year Model</li> <li>Twelve Disciplines Plus One Procedures On Paper (POP) Looking at the Major Systems</li> </ul> |

# Module Three—How Agency Leaders Educate and Train

**Essence of Module** - Assists in building a program of education and training for associates. Become acquainted with proven development programs and procedures.

**Module Objective** - Establishes an orderly approach for building an educational program. Develops and builds confidence in the agent development process. Examines resources for educating agents and improves effectiveness in building attitudes, teaching sales strategies, and managing activity.

| Key Concepts   | Tools Checklist   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Agent Development Successful Environment 12 Activities of an Agent Market Analysis</li> <li>• Client Building Process</li> <li>• New Agents Training Development Fast Start Strategies</li> </ul> | <ul style="list-style-type: none"> <li>• 12 Activities of an Agent Planning the Ideal Day Relationship-Building Checklist Market Analysis</li> <li>• Client-Building Process Thoughts to Remember Self-Concept</li> <li>• How Agents Can “Tilt the Scales in Their Favor”</li> <li>• Box-Time Theory</li> </ul> | <ul style="list-style-type: none"> <li>• Goal Attainment</li> <li>• How a Young Agent Got Started Principles of Adult Learning</li> <li>• Build Your Agents to be Indispensable to Clients Agent Coaching Evaluation</li> <li>• Educational Coaching Sessions Professional Development Checklist Your “Commercial”</li> <li>• What Do You Do?</li> </ul> |

# Module Four—How Agency Builders Market

**Essence of Module** - Compose your marketing plans and philosophies to help your organization develop as a marketing firm. Your agents will learn how to create prospects and clients through your experiences.

**Module Objective** - Transition the culture of a sales organization to a modern marketing organization. Develop the skills necessary to become better at marketing to prospects.

| Key Concepts  | Tools Checklist  |
|---|--|
| <ul style="list-style-type: none"> <li>• Importance of a Marketing Culture Basic Marketing Strategies</li> <li>• Keys to Solid Marketing Program Top of the Mind Awareness</li> <li>• PR for the Professional Agent Referred Lead Introductions The Three Areas of Marketing</li> <li>• Implementing a Good Marketing Concept in Your Agency</li> </ul> | <ul style="list-style-type: none"> <li>• Personal Marketing Plan of Action Low-Budget Marketing Strategies</li> <li>• Examine Improvement Possibilities</li> </ul> |

# Module Five—How Agency Leaders Manage Finance

**Essence of Module** - Support in examining, diagnosing, prescribing and monitoring personal financial well-being. Develop and follow a comprehensive plan to achieve specific monetary goals. Challenged to examine attitude and motivation for seeking financial success.

**Module Objective** - Assists associates in managing personal finances.

| Key Concepts  | Tools Checklist  |  |
|---|--|--|
| <ul style="list-style-type: none"> <li>• Financial “Twelve Percenters” Financial Goal Setting</li> <li>• Income (and Cash Flow) Statement Balance Sheet</li> <li>• Budget</li> <li>• Living Within Your Means Liquidity, Risk and Return</li> </ul> | <ul style="list-style-type: none"> <li>• Seven Traits of Effective Financial Goals Dealing with Debt</li> <li>• Safety and Rewards for Investment Getting Organized</li> <li>• Income (and Cash Flow) Statement Personal Balance Sheet</li> <li>• Worksheet for a Special Goal Budget Organizer</li> </ul> | <ul style="list-style-type: none"> <li>• Checking Your Debt Load Financial Self-Assessment</li> <li>• Planned Income Needs for This Year Planned Income Needs for the Coming Year Start-up Recommendations</li> <li>• Drafting Your Financial Goals Checklist of Possible Goals Revising Your Financial Goals</li> </ul> |

# Module Six—How Agency Leaders Monitor and Measure

**Essence of Module** - Utilize the triangular approach for managing production. Encounter and discover the positive impact monitoring and measuring has on agent productivity, retention and development.

**Module Objective** - Understand effectiveness in setting goals and gaining responsible commitments. Become better prepared to conduct monthly forecasts and weekly performance reviews. Manage with a greater confidence in monitoring activities and measuring results.

| Key Concepts  | Tools Checklist   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• The Production Triangle Growing Winners Performance Evaluation Planning Sessions</li> <li>• Stay Brilliant on the Basics Upgrade Menu / Achieve Vertical Growth</li> <li>• Set the Management Focus Monthly</li> </ul> | <ul style="list-style-type: none"> <li>• What Agents Expect</li> <li>• Water the Performance You Want to Grow “PEP” Session Questionnaire</li> <li>• “PEP” Pointers</li> <li>• Agent’s Weekly Progress Guide Performance Improvement Formula</li> </ul> | <ul style="list-style-type: none"> <li>• Expectations of Management</li> <li>• How Well Do You Manage Your Time? Monthly Focus Report</li> <li>• Agency Leader’s Progress Guide Helpful Monitoring Activities Monitoring in Your Agency</li> </ul> |



# Module Seven—How Agency Leaders Multiply to Maximize

**Essence of Module** - Examine how to select and develop key management and office personnel. Carefully selected and trained multipliers position greater and stronger leaders.

**Module Objective** - Develops your process for attracting and developing others. Leveraging ability and time to focus on the high pay-off activities creates a greater return. Learn how and when to delegate to others.

| Key Concepts   | Tools Checklist  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>• Bringing Out the Best in Others Organizational Multipliers</li> <li>• Five Ongoing Evaluations Marketing Team Leader Impact Leadership Core Competencies</li> </ul> | <ul style="list-style-type: none"> <li>• Organizational Chart/Traditional Life Agency The Advantages of Joint Selling</li> <li>• Agency Leader’s Success Points Organizational Chart/“Rainmaker” Improving Skill Levels</li> </ul> | <ul style="list-style-type: none"> <li>• Multipliers are Selected to be Winners Your Organizational Chart</li> <li>• Key Office Person Evaluation Developing Marketing Team Leaders How Do You Multiply?</li> </ul> |

# Module Eight—How Agency Leaders Motivate and Lead

**Essence of Module** - Study and perfect the ways in which the Agency Builder motivates and leads.

**Module Objective** - Practice how to develop the eight motivational dimensions. Improve effectiveness as a relationship builder and a manager of time and resources.

| Key Concepts   | Tools Checklist  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>• The Hierarchy of Needs Motivating at the Higher Levels Eight Motivation Dimensions Effectiveness vs. Efficiency</li> <li>• Developing Time Sense Relationship Building</li> <li>• Enhancing Leadership</li> </ul> | <ul style="list-style-type: none"> <li>• Leadership Makes the Difference Important Management Words Make Sales Bulletins Sparkle The Might of Little Things</li> <li>• This Year’s Forecast</li> </ul> | <ul style="list-style-type: none"> <li>• Know Where Your Time Goes Administration</li> <li>• Sales Meetings Grading Your Skills Boss vs. Motivator</li> </ul> |

# Module Nine—How Agency Leaders Embrace Ethical Conduct

**Essence of Module** - Embrace and become acquainted with ethical philosophies, practices and programs which significantly impact profitable outcomes, benefits and reputations for Agents, Agency Leaders and the organization.

**Module Objective** - Become more cognitive and effective in developing and maintaining compliance consciousness in the Agency. Cultivate and promote seven tools for bringing out the best in people.

| Key Concepts  | Tools Checklist  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>• Compliance Consciousness Philosophies That Win Practices Which Succeed Profitable Benefits</li> <li>• Bringing Out the Best in Associates</li> </ul> | <ul style="list-style-type: none"> <li>• The Insurance Agent</li> <li>• Quality Service Philosophies</li> <li>• The Learning Curve</li> <li>• Management’s Quest to Be the Best The Power of Vision</li> <li>• The Formation and Results of Various Goals</li> </ul> | <ul style="list-style-type: none"> <li>• “Flow”</li> <li>• Relationship of Belief, Potential, Behavior and Results</li> <li>• Commandments for the Business World Ethics That Work</li> <li>• Personal Code of Ethics Plan of Action</li> </ul> |

# Module Ten—How Agency Leaders Live in Balance

**Essence of Module** - Achieve and encourage balance in the professional, physical, financial, mental, social and spiritual dimensions of life. Discover how to stay effective and avoid “career threatening” obstacles by giving attention to each area of life across time.

**Module Objective** - Ascertain how to maintain success through living a life that is both focused and balanced. Define personal goals for the five most important areas of life. Develop a plan for scheduling each week to include time for each of the five areas.

| Key Concepts   | Tools Checklist   |   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Focused Attention</li> <li>• The Necessity of Balance Life’s Five Dimensions Your Professional Life Your Physical Life</li> <li>• Your Financial Life Your Personal Life Your Spiritual Life</li> </ul> | <ul style="list-style-type: none"> <li>• Attitude</li> <li>• Characteristics of Peak Performers How You Set Goals</li> <li>• Health Tips</li> <li>• Issues of Centrality Self-Talk Ideas</li> </ul> | <ul style="list-style-type: none"> <li>• Life’s Five Dimensions Professional Goal Setting Physical Goal Setting Core Issues</li> <li>• A Plan to Begin Your Purpose/ Mission Statement</li> <li>• Weekly Planner</li> </ul> |

# Module Eleven — How Agency Builders Communicate Effectively

**Essence of Module** - Think through and communicate your plans and philosophies, as well as how to broadcast good news.

**Module Objective** - Identify opportunities for effective communication. Instruct and inspire.

| Key Concepts  | Tools Checklist   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Communication Philosophy</li> <li>• Communication Principle</li> <li>• Communication Strategies</li> <li>• Communication System Effectiveness</li> </ul> | <ul style="list-style-type: none"> <li>• The Starting Point Make Bulletins Sparkle</li> <li>• The Might of Little Things Monday Morning Memo</li> </ul> | <ul style="list-style-type: none"> <li>• Build an Effective Communication System Impact of Recognition</li> <li>• Percentage Commitment Achieved Monthly Report</li> </ul> |



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