

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 50 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"> • Philosophy • Mission & Vision Statements • Agency Year-by-Year Model • Agency Profile (59 Dimensions, Star Analysis) • Procedures on Paper (POP) Manual • Management Accountability 	<ul style="list-style-type: none"> • Your Mission and Vision Statements • What is Planning? • Planning Process • Dimensions Agency Profile • Business Self-Assessment • Self-Analysis Questionnaire • Success Model • Sample Mission Statement

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"> • The Number One Job • Basic Principles • Searching Sources • Structured Interview • Candidate Five Questions 	<ul style="list-style-type: none"> • 18 Factors Affecting Retention • Who Succeeds Around Here? • Ideal Profile • Total Sales Force • Pre-Approach Letters to Prospective Producers • Evaluation Highlights • Unlikely To Be Successful Factors • Recruiting Success Formula • Commitment Interview • Operation Fast Start • New Producer Development Grid • Model Joint Work Schedule • The Critical 90-Day Follow-Up Checklist • Develop An Atmosphere of Success • Induction Initiatives

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"> • Agent Development: An Ongoing Process • Success Syndrome –“Create a Success Environment” • 12 Activities of An Agent • Market Analysis • Client Building Process • New Agent Training Development • Fast Start Strategies 	<ul style="list-style-type: none"> • The 12 Activities of An Agent • Planning the Ideal Day for Agents (Sample) • Relationship-Building Checklist • Market Analysis • Client-Building Process • Thoughts to Remember • Self-Concept • How Agents Can “Tilt the Scales in Their Favor” • Box-Time Theory

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
<p>Communicate</p> <ul style="list-style-type: none"> • Communication Philosophy • Communication Principles • Communication Methodology • Communication System Effectiveness <p>Market</p> <ul style="list-style-type: none"> • Marketing Philosophy • Marketing Strategies • Marketing Plan • Increasing Your “Professional Equity” 	<ul style="list-style-type: none"> • The Starting Point • Make Bulletins Sparkle • The Might of Little Things • Building the Marketing Plan • Low-Budget Marketing Strategies • Monday Morning Memo • Build An Effective Communication System • Impact of Recognition • Percentage Commitment Achieved Monthly Report • Marketing

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"> • Financial “Twelve Percenters” • Financial Goal Setting • Income (and Cash Flow) Statement • Balance Sheet • Budget • Living Within Your Means • Liquidity, Risk and Return 	<ul style="list-style-type: none"> • Seven Traits of Effective Financial Goals • Dealing with Debt • Safety and Rewards for Investments • Getting Organized • Income (and Cash Flow) Statement • Personal Balance Sheet • Work Sheet for A Specific Goal • Budget Organizer

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"> • The Production Triangle • Growing Winners • Performance Evaluation and Planning (PEP) Sessions • Staying Brilliant on the Basics • Achieve Vertical Growth / Upgrade Menu • Set the Management Focus Monthly 	<ul style="list-style-type: none"> • What Agents Expect • Water the Performance You Want to Grow • “PEP” Session Questionnaire • “PEP” Pointers • Agent’s Weekly Progress Guide • Performance Improvement Formula

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"> • Bringing Out the Best in Others • Organizational Multipliers • Five Ongoing Evaluations • Marketing Team Leader Impact • Leadership Core Competencies 	<ul style="list-style-type: none"> • Organizational Chart / Traditional Life Agency • The Advantages of Joint Selling • Agency Leader's Success Points • Organizational Chart / "Rainmaker" • Improving Skill Levels

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"> • The Hierarchy of Needs • Motivating at The Higher Levels • 8 Motivation Dimensions • Effectiveness Versus Efficiency • Developing Time Sense • Enhancing Leadership 	<ul style="list-style-type: none"> • Leadership Makes the Difference • Important Management Words • Items that Make Sales Bulletins Sparkle • The Might of Little Things • This Year's Forecast

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"> • Compliance Consciousness • Philosophies That Win • Practices That Succeed • Profitable Benefits • Bringing Out the Best in Your Associates 	<ul style="list-style-type: none"> • The Insurance Agent • Quality Service Philosophies • ... And Then Some • The Learning Curve • Management's Quest to Be the Best • The Power of Vision • The Formation and Results of Various Goals

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"> • Focused Attention and The Necessity of Balance • Life's Five Dimensions • Your Professional Life • Your Physical Life • Your Financial Life • Your Personal Life • Your Spiritual Life 	<ul style="list-style-type: none"> • Attitude • Characteristics of Peak Performers • How You Set Goals • Health Tips • Issues of Centrality • Self-Talk Ideas

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



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