

KINDERBROTHERS
INTERNATIONAL

Professional Patterns of Management



**BUILD
CAPABILITY**
RECRUIT QUALITY



**DEVELOP
TALENT**
TRAIN & MONITOR



**AGENCY
SYSTEMS**
SCALABILITY &
SUSTAINABILITY

GLOBAL MINDS.
STRONGER TEAMS.
A BRIGHTER FUTURE.

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

GLOBAL MINDS. STRONGER TEAMS. A BRIGHTER FUTURE.

OVERVIEW

Built for sustainable agency growth

The life insurance market is positioned for continued growth. Kinder Brothers International creates training solutions for distinct markets and cultures, helping organizations build stronger leaders from the agent level through the executive team.

A proven global partner

For decades, Kinder Brothers International has worked with leading insurance and financial-services companies around the world. Its consultants bring direct industry experience into every learning environment, turning real-world practice into practical development.

EXPERIENCE THAT TRANSFERS

More than 200 years of collective industry experience across the consulting team, reinforced through facilitation, practical examples and follow-up evaluation.



PROVEN

Comprehensive content used by managers across global markets.

PRACTICAL

Tools and systems designed for immediate application.

SUSTAINABLE

A management system built to support long-term agency growth.

PROGRAM

One system. Eleven management disciplines.

Professional Patterns of Management (PPM) is a comprehensive development program for Sales and Agency Leaders. It equips managers to recruit effectively, increase productivity, develop people and build a sustainable sales force.



Primary benefits

- A single, trusted training partnership
- Transferable, proven management content
- Modular format that is easy to implement
- Reduced implementation time

Designed for leaders who want to

- Select, evaluate and recruit high-potential agents
- Educate and Train agents
- Communicate effectively
- Create a marketing culture in the agency
- Set agents up for early success

LEADERSHIP IMPACT

Build capability at every level



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

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

Designed for leaders who want 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
- Create a marketing culture in the agency

01

How Agency Leaders Think and Plan

ESSENCE

Develop skills in planning for desired results and clarify the management position, its responsibilities and expectations.

OBJECTIVE

Challenge leaders to maximize personal development and use a disciplined model to plan organizational growth. Additionally, identifies four key areas that need time and attention.

KEY CONCEPTS

- Philosophy Mission/Vision
- Agency Year-by-Year Model Agency Profile
- Procedures on Paper (POP) Management Accountability

TOOLS CHECKLIST

- Your Mission and Policy What is Planning?
- Planning Process
- 59 Dimensions Agency Profile Business Self-Assessment Self Analysis Questionnaire Success Model
- Sample Mission Statement
- Organizational Chart/Traditional Life Agency Management by Objectives
- Total Sales Force
- Key Planning Questions Year-by-Year Model
- Twelve Disciplines Plus One Procedures On Paper (POP) Looking at the Major Systems

02

How Agency Leaders Recruit Winners

ESSENCE

Formulate a proven process for attracting, selecting, evaluating and inducting high-potential producers each year.

OBJECTIVE

Connect recruiting with production, improve probing interviews and strengthen persuasion in the presentation step.

KEY CONCEPTS

- The Number One Job Basic Principles
- Searching Sources
- Structured Interview
- Candidates' Five Questions

TOOLS CHECKLIST

- 18 Factors Affecting Retention Who Succeeds Around Here? Ideal Profile
- Total Sales Force
- Pre-Approach Letters Evaluation Highlights
- Unlikely to be Successful Factors Recruiting Success Formula Commitment Interview
- Operation Fast Start
- New Producer Development Grid Model Joint Work Schedule
- Critical 90-Day Follow-Up Checklist Develop an Atmosphere of Success Induction Initiatives
- Develop Commitment Interview
- Organizational Chart/Traditional Life Agency Management by Objectives
- Total Sales Force
- Key Planning Questions Year-by-Year Model
- Twelve Disciplines Plus One Procedures On Paper (POP) Looking at the Major Systems

03

How Agency Leaders Educate and Train

ESSENCE

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

KEY CONCEPTS

- 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

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.

TOOLS CHECKLIST

- 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
- Goal Attainment
- How A Young Agent Got Started
- Principles of Adult Learning
- Build Your Agents to be Indispensable to Their Clients
- Agent Coaching Evaluation
- Educational Coaching Sessions
- Professional Development Checklist
- Your “Commercial”
- What Do You Do?

04

How Agency Builders Market

ESSENCE

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

KEY CONCEPTS

Communicate

- Communication Philosophy
- Communication Principles
- Communication Methodology
- Communication System Effectiveness

Market

- Marketing Philosophy
- Marketing Strategies
- Marketing Plan
- Increasing Your “Professional Equity”

OBJECTIVE

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

TOOLS CHECKLIST

- 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

05

How Agency Leaders Manage Finance

ESSENCE

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.

OBJECTIVE

Assists associates in managing personal finances.

KEY CONCEPTS

- Financial “Twelve Percenters”
- Financial Goal Setting
- Income (and Cash Flow) Statement
- Balance Sheet
- Budget
- Living Within Your Means
- Liquidity, Risk and Return

TOOLS CHECKLIST

- 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
- Checking Your Debt Load
- Financial Self-Assessment
- Planned Income Needs for This Year
- Planned Income Needs for the Coming Year
- Start-up Recommendations
- Drafting Your Financial Goals
- Checklist of Possible Goals
- Revising Your Financial Goals

06

How Agency Leaders Monitor and Measure

ESSENCE

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

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

- 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

TOOLS CHECKLIST

- What Agents Expect
- Water the Performance You Want to Grow
- “PEP” Session Questionnaire
- “PEP” Pointers
- Agent’s Weekly Progress Guide
- Performance Improvement Formula
- Expectations of Management
- How Well Do You Manage Your Time?
- Monthly Focus Report
- Agency Builder’s Progress Guide
- Helpful Monitoring Activities
- Monitoring in Your Agency

07

How Agency Leaders Multiply to Maximize

ESSENCE

Examine how to select and develop key management and office personnel. Carefully selected and trained multipliers position greater and stronger leaders.

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

- Bringing Out the Best in Others
- Organizational Multipliers
- Five Ongoing Evaluations
- Marketing Team Leader Impact
- Leadership Core Competencies

TOOLS CHECKLIST

- Organizational Chart/Traditional Life Agency
- The Advantages of Joint Selling
- Agency Leader's Success Points
- Organizational Chart / "Rainmaker"
- Improving Skill Levels
- Multipliers Are Selected To Be Winners
- Your Organizational Chart
- Key Office Person Evaluation
- Developing Marketing Team Leaders
- How Do You Multiply?

08

How Agency Leaders Motivate and Lead

ESSENCE

Study and perfect the ways in which the Agency Builder motivates and leads.

OBJECTIVE

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

KEY CONCEPTS

- The Hierarchy of Needs
- Motivating at The Higher Levels
- 8 Motivation Dimensions
- Effectiveness Versus Efficiency
- Developing Time Sense
- Enhancing Leadership

TOOLS CHECKLIST

- Leadership Makes the Difference
- Important Management Words
- Items that Make Sales Bulletins Sparkle
- The Might of Little Things
- This Year's Forecast
- Know Where Your Time Goes
- Administration
- Sales Meetings
- Grading Your Skills
- Boss Vs. Motivator

09

How Agency Leaders Embrace Ethical Conduct

ESSENCE

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.

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

- Compliance Consciousness
- Philosophies That Win
- Practices That Succeed
- Profitable Benefits
- Bringing Out the Best in Your Associates

TOOLS CHECKLIST

- The Insurance Agents
- 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
- "Flow"
- Relationship of Belief, Potential, Behavior and Results
- Commandments for the Business World
- Ethics That Work
- Your Personal Code of Ethics
- Plan of Action

10

How Agency Leaders Live in Balance

ESSENCE

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.

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

- 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

TOOLS CHECKLIST

- Attitude
- Characteristics of Peak Performers
- How You Set Goals
- Health Tips
- Issues of Centrality
- Self-Talk Ideas
- Life's Five Dimensions
- Professional Goal Setting
- Physical Goal Setting
- Core Issues
- A Plan to Begin Your Purpose/ Mission Statement
- Weekly Planner

11

How Agency Builders Communicate Effectively

ESSENCE

Think through and communicate your plans and philosophies, as well as how to broadcast good news.

OBJECTIVE

Identify opportunities for effective communication.
Instruct and inspire.

KEY CONCEPTS

- Communication Philosophy
- Communication Principle
- Communication Strategies
- Communication System Effectiveness

TOOLS CHECKLIST

- The Starting Point
- Make Bulletins Sparkle
- The Might of Little Things
- Monday Morning Memo
- Build An Effective Communication System
- Impact of Recognition
- Percentage Commitment Achieved Monthly Report



Clear communication turns plans into coordinated action.

Professional Patterns of Management

A management development course leading to the
Chartered Financial Field Leader for Managers designation.

CONTACT

David Smith, President | DSmith@KinderBrothers.com

Diego Chornogubsky, Vice President & Senior Consultant | DChornogubsky@KinderBrothers.com

Ron Dupuis, Vice President & Senior Consultant | RDupuis@KinderBrothers.com

Vincent Ku, KBI Consultant | VKu@KinderBrothers.com