



Improving Performance Seminar

This two-day topical seminar helps the manager establish effective production goals with agents, conduct effective performance analysis to identify gaps in performance, and provide training, counseling, coaching, and motivation to help agents eliminate the gaps. It will also cover the principles of effective agency sales contests. *Also available as self-study.*

Introduction to Productive Supervision

This session on activity-based supervision considers activities to be supervised, standards of performance, ways to evaluate performance, and setting goals for future growth.

Developing Performance Standards

Participants apply supervision theory to their own operations by establishing production goals and then translating the production goals into the activity measures needed to meet the goals. Participants also consider how they will monitor progress toward their goals.

Coaching Analysis Workshop

In this session, the instructor introduces a chart designed to assist participants in analyzing performance problems. The balance of the session is spent in analyzing actual performance problems faced by case leaders.

Planning Effective Training

The principles of adult learning serve as the foundation for this session on diagnosing training needs and preparing valid training objectives. Following a discussion of the levels of learning, participants are introduced to the PESOS training process.

PESOS Training Process

This session relates training to improved retention and production.

Training Methods

This session presents five individual training methods and three group training methods. The emphasis is on effective on-the-job training as participants discuss solutions to training problems and ways to evaluate training results.

Open Forum – Supervision and Training

This session allows participants to discuss concerns and problems related to the supervision and training aspects of their job with other field managers. Participants have an opportunity to submit topics and questions on a preseminar form. A LIMRA instructor serves as a moderator.

PESOS in Action

As an evening assignment, participants were asked to prepare an individualized development program for a member of their sales staff. In this session, several participants share the key points of their completed projects.

Continuous Development

An eight-step process serves as the guide to conducting coaching or counseling sessions. Participants consider the four skills needed to conduct supervision interviews and ways to avoid obstacles to coaching analysis.

Coaching and Counseling Interviews

Participants build their interviewing skills by following the Coaching and Counseling Interview Guide when role-playing supervision interviews based on realistic situations.

Influencing Motivation

This session explores ways that participants can influence motivation so that people will want to achieve greater productivity. Topics discussed include leadership, handling personal problems, the variables that influence motivation, and team-building.

Increasing Contest Benefits

Following a discussion of the benefits and drawbacks of sales campaigns and contests, participants work together in teams to create a plan for increasing the benefits of a target marketing contest.

Open Forum – Continuous Development and Motivation

LIMRA research serves as the foundation for a discussion of how experienced agents rate their managers and supervisors in areas related to improved performance and productions. This session allows participants to discuss concerns and problems related to the continuous development and motivation aspects of their job with other field managers. Again, participants have an opportunity to submit topics and questions on a preseminar form. A LIMRA instructor serves as a moderator.

Commitment to Action

Following the seminar, participants are expected to complete the action projects in *Improving Performance*. They are also expected to complete a comprehensive review detailing their application of the knowledge and skills gained from the seminar and workbook. During this session, project instructions are reviewed in detail. The seminar closes with suggestions for avoiding the roadblocks to personal growth.