



## Planning For Productivity Seminar

This two-day topical seminar encompasses the critical areas of planning, problem solving, business management, keeping a field sales office profitable, budgeting, expense management, increasing sales representative financial management skills, and time management. *Also available as self-study.*

### **Planning for Success**

This session considers the benefits of planning to field managers. Participants identify three levels of planning used in a field sales office, apply the DOME planning process, and create a foundation for planning.

### **DOME – Diagnosis**

Participants identify the internal and external factors affecting their field sales offices, consider ways to analyze the strengths and weaknesses of their operations, and apply the principles of diagnosis to a field sales office.

### **DOME – Objectives**

This session enables participants to ensure immediate results from planning, to set objectives, to capitalize on major opportunities, and to apply the principles of objective-setting to a field sales office.

### **DOME – Methods and Evaluation**

The focus is on using action plans to accomplish specific objectives and monitoring the results of planning. Participants analyze a sample action plan and then develop an action plan to complete the methods step of the DOME planning process for a field sales office.

### **Solving Problems**

This session relates problem-solving to planning and presents a five-step problem-solving process. Discussion focuses on the difference between problems and symptoms, the principles of problem identification, and the factors to consider in selecting alternative solutions.

### **Problem-Solving in Action**

Participants apply the problem-solving process. After reviewing a sample case, participants practice solving problems being experienced by real field sales offices.

### **Open Forum – Planning and Problem-Solving**

This session allows participants to discuss key issues and concerns related to management planning and problem-solving with other field managers. Participants have an opportunity to submit topics and questions on a preseminar form. A LIMRA instructor will serve as a moderator.

### **Identifying Profitable Management**

In this session, participants discuss the importance of business management in field sales office management, identify their responsibilities as business managers, and analyze field sales office economics. Workshops provide an opportunity to consider the implications of the company's compensation plans when making key business decisions.

### **Keeping the Sales Office Profitable**

The session presents a five-step program to help keep field sales operations profitable. Participants work together to develop techniques to maintain the profitability of their field sales offices.

### **Profitable Management in Action**

In this session, the instructor presents a six-step budgeting process managers can use to increase profitability and control. Discussion centers on identifying key expense management considerations, improving persistency, and implementing an effective control system.

### **Sales Representatives and Financial Management**

LIMRA research is the basis for information on the factors that make a sales representative a better business person. Participants learn how to control expenses by guiding sales representatives into sound financial practices and ways to increase the financial management skills of sales representatives.

### **Managing Your Time**

Time is an vital business resource. Following a discussion of ways to overcome the obstacles to effective time management, participants use the activity time records they completed as a preseminar assignment to analyze their own use of time. The session closes with a discussion of ways to assist sales representatives and middle managers in time management.

### **Open Forum – Business and Time Management**

LIMRA research serves as the foundation for a discussion of the activities and time-allocations of managers from high- and low-retention companies. Participants discuss key issues and concerns related to the topics of business and time management. Again, participants have an opportunity to submit topics and questions on a preseminar form. A LIMRA instructor serves as a moderator.

### **Charting Your Course**

The instructor suggests ways for participants to apply management tools in their own lives. Following the seminar, participants are expected to complete the action projects in LIMRA's *Planning for Productivity*. 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 maintaining a winning attitude.