

Field Development & Performance Virtual Summit

Building a Better Field, Building a Better You

Thursday, September 20, 2012

Conference Presentations

General Session 1

Work with Your Brain In Mind

Jennifer Pope Moore, Owner, Sway, LLC

This session is based on the Neuroscience of Leadership, an emerging field of study focused on bringing neuro-scientific knowledge into the workplace to boost human and organizational performance. It concentrates on improving decision-making and problem solving, emotional regulation, collaborating with others, and facilitating change. We'll use research findings to help you become more productive by:

- Becoming aware of how your brain processes information so you can manage it, instead of it managing you
- Understanding the myth of multi-tasking (and what it costs you)
- Keeping your cool to stay productive

Track 1: Producer Management & Development

Onboarding A New Associate

Ed Ayala — Chief Operating Officer, Strategies for Wealth

Your onboarding process is an inherent factor in producers' early experience with, and impression of, your organization. However, to be effective — and to keep your new recruits engaged — it is critical that it is consistent, clear, and driven by results. In this session, Ed will share the process of how to get new producers up and running in 90 days or less — by setting clear expectations of what is required, based on activity, production, and training.

Team Selling

Diane Smith — AVP, Elite Producer Group Operations, AXA Equitable

There are many benefits and challenges of team selling. During this workshop, the facilitator will review the advantages of collaborative selling/teaming and provide ideas and examples of various types of team selling opportunities. Insights and guidelines for partnership programs and how to nurture the success of the partnership will also be provided. Participants in this session will be able to take concrete ideas back to their training teams to support the development of programs that can help accelerate advisor growth.

- Define the value proposition of team/collaborative selling
- Identify different team selling opportunities and programs
- Determine key considerations for driving successful partnerships
- Takeaways to incorporate in advisor training programs to promote team/collaborative selling

Key Elements To A Successful Practice Succession Program

Don McLaughlin, CLU, ChFC, MSM — Director of Business Development, Principal Financial Group

Gregory S. Winsper, CLU — Managing Director, Professional & Practice Development Group, Penn Mutual Life Insurance Company

There is an extraordinary transition underway in our industry right now, and it is either a tremendous opportunity or a ticking time bomb. It is up to each company to decide which it will be. "Succession Planning" is a phrase we are hearing more and more as the financial services industry wrestles with approaching retirement of many of its producers. With 40% of U.S. producers planning to retire in less than 10 years, concern is high around this topic. Succession planning is more than just finding a replacement at retirement. It is about maximizing value, increasing exit options and fulfilling commitments to clients. "A Transition of Trust" identifies some of the key issues that companies need to address while coming to grips with the silver tsunami of baby boomer retirements.

A Professional Approach to Referrals and Prospecting

Dan Allison — Owner/Consultant, Feedback Marketing Group

Dan's flagship presentation engages participants with an ideal blend of humor, insight, and strategy. In this presentation, Dan will walk your group through the real problem that consumers face in referring the professionals they work with. Then he will show your participants how to implement simple strategies that will help them start getting referrals right away. Drawing from his background in clinical and behavioral psychology, Dan has interviewed hundreds of clients to learn how they want to be approached. The results are detailed in this popular talk that has been described as "brilliantly simple," "eye-opening," and "the most refreshing presentation in years." Participants in your event will learn:

1. Why the majority of their clients do not give referrals as frequently as they could.
2. The true roadblocks that prevent most professionals from creating effective referral relationships.
3. How to implement simple, step-by-step strategies to begin getting referrals immediately

Track 2: Training Program Development & Self Growth

Measurement: Evaluating Training For Results

Eric More — VP, AXA Advisors Online Learning; AXA Equitable

Dawn Tryba — VP, AXA Advisors Training Implementation, AXA Equitable

We train to meet specific objectives, to develop new skills, and produce better business results. But how can we be sure our training is having an impact? How do we know it is achieving what we want it to? These are questions trainers are regularly challenged to answer and show the value of the training investment. To answer this question, a solid measurement strategy is needed to evaluate the results of training. In this session, we will cover basic theory and practical application of training measurement. Specifically we will review.

- Define the four levels of training measurement (Kirkpatrick Model)
- Identify the foundation of a successful measurement strategy
- Apply an effective process to measure training results

Repurposing Content for Virtual Classroom Delivery

Sarah Schmidt, ACS, ALMI — Learning Technology Consultant, Talent Development, LIMRA

This workshop helps trainers, managers and product specialists redesign traditional classroom training to highly interactive virtual classroom delivery. Learn why “repurposing” does not equal “reusing” and how to objectively review current content, convert F2F activities into meaningful VC activities, and increase engagement with your audience.

Managing in a Virtual World

Delores Freitag — AVP, Talent Development, LIMRA

The use of remote staff is growing – and your organization can make these work arrangements a viable option or a costly expense. Once you have determined who is best suited for the virtual environment and have the right people in place, managers need to be prepared for this out-of-culture experience. To lead their teams to success, managers must be equipped to navigate the unique challenges associate with virtual work arrangements.

Facilitation Skills

Leslie Lamb — Manager, Field Management Development, Freedom 55 Financial, London Life

This session will help you identify new facilitation styles and to apply to your current training sessions to maximize the learning experience for your participants. Through a webinar presentation and online group activities, you will learn different facilitation strategies that will help enhance the training experience. Our goal is to provide you with the ability to modify your facilitation style to better engage learners while improving your skills and application of training.

General Session 2

The Business Case For Learning Transfer

Andy Jefferson — Chief Executive Officer, Fort Hill Company

Nothing matters without results. These presenters will discuss the 6Ds and offer a straightforward but profound methodology for achieving extraordinary results, time after time.

