LIMRA Talent Solutions International

Agency Management Training Course

The **Agency Management Training Course** (AMTC) is a skills-based program designed to help a field manager fully develop and sharpen 28 specific management skills in the areas of planning and goal setting, recruiting and selection, training, and activity management.

Participants who complete this course have the demonstrated ability to improve key agency-success metrics, including:

- Retention of full-time agents
- New premium written by new full-time agents
- Number of new agents contracted
- Number of potential recruits

Target Audience:

- Sales managers making the transition from a position with production responsibility to one with managerial responsibility
- Agency heads or functional managers, those with specialized functions such as recruiting or training, and those who need to develop their management skills to increase performance
- Established agency managers looking for a refresher on essential sales-management practices and as a source of new ideas from fellow participants

Delivery Option:

- Modular classroom training — Thirteen-day course consisting of five sessions, emphasizing adult-learning techniques and practices, led by a LIMRA Certified Facilitator or LIMRA Certified Company Facilitator:
  o Session 1 — Introduction and Planning (2 days)
  o Session 2 — Recruitment (3 days)
  o Session 3 — Selection (3 days)
  o Session 4 — Training (2 days)
  o Session 5 — Performance Management and Planning for the Future (3 days)
- Weekly classroom training — Twenty-three week course consisting of a single three-hour class each week, emphasizing adult-learning techniques and practices, led by a LIMRA Certified Facilitator or LIMRA Certified Company Facilitator

The AMTC trains in skills that LIMRA research has identified as critical to successful sales and agency management and, through a unique classroom environment, provides an experience that lasts a lifetime.

For more information visit www.limra.com/AMTC or contact talentsolutionsinternational@limra.com

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The *Agency Management Training Course* focuses on building agency managers' skills to succeed in today's competitive business environment.

AMTC continues to be the premier skill-development program for sales managers worldwide, because it produces quantifiable results. Course graduates earned significantly higher ratings from their managers, when evaluated on AMTC skills including:

- Developing and using an annual plan — improved by 25 percent
- Conducting individual agent reviews — improved by 24 percent
- Making a career presentation — improved by 22 percent
- Analyzing agent activity records — improved by 22 percent

AMTC **is one of LIMRA's Chartered Insurance Agency Manager (CIAM) designation courses.**

The CIAM designation provides a track for professional development and a benchmark for measuring and recognizing manager performance.

LIMRA

AMTC
Agency Management
TRAINING COURSE

CURRICULUM OVERVIEW

Through either the 13-day modular session or the 23 once-a-week, three-hour AMTC classes, participants will acquire knowledge and develop skills in the following five critical areas of management.

Planning

Help identify the unit/agency culture, develop a mission and philosophy statement, and build an annual plan to achieve specific goals and objectives. Develop skill in helping agents review their performance and plan for the future.

Recruiting

Identify and talk to recruits with high potential using proven techniques of agent referral, warm nominators, and personal activity. Develop approaches to these sources and learn alternative recruiting methods.
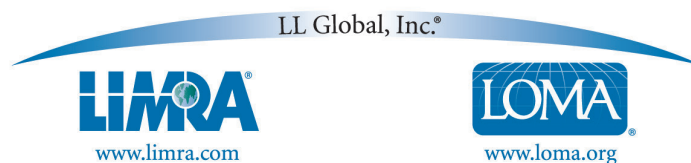
Selection

Discover proven selection methods and develop a process that can help reduce agent turnover. Create a job-sampling program to help select high-potential recruits.

Training

Learn training techniques that effect a change in your agents' behaviors. Develop skills in setting training objectives, role-playing, and joint work. Leverage agency meetings, conferences, and clinics to develop agents' skills to achieve training objectives.

Performance Management

Develop key supervisory skills and use a proven problem-solving process. Learn to manage agents' activity and customize the development of your agents for improved performance.