AMTC

Agency Management Training Course

MODERATOR'S CONFERENCE GUIDE

Moderator's Conference
Packet International

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regulation, and determine whether the services of a competent legal or tax professional should be sought.

GENERAL INFORMATION

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MODERATOR'S CONFERENCE: SCHEDULE OF EVENTS

Time	Event
First Day	
9:00 a.m. – 9:25 a.m.	Welcome and Overview
9:25 a.m. – 12:30 p.m.	Demonstration of How to Moderate AMTC
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 2:45 p.m.	A Typical AMTC Class
2:45 p.m. – 3:00 p.m.	Break
3:00 p.m. – 4:10 p.m.	Working With AMTC Students
4:10 p.m. – 4:25 p.m.	Break
4:25 p.m. – 5:00 p.m.	Assignment for Day 2 (Class 5)
Second Day	
9:00 a.m. – 9:20 a.m.	Overview of Day 1
9:20 a.m. – 12:30 p.m.	Practice Moderating 1 (Class 5)
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:00 p.m.	Feedback and Discussion of Practice 1 (Class 5)
3:00 p.m. – 3:15 p.m.	Break
3:15 p.m. – 4:15 p.m.	Training Concept in AMTC
4:15 p.m. – 4:30 p.m.	Break
4:30 p.m. – 5:00 p.m.	Assignment for Day 3 (re-assign Class 5)
Third Day	
9:00 a.m. – 9:20 a.m.	Overview of Day 2
9:20 a.m. – 12:30 p.m.	Practice Moderating 2 (Class 5)
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 2:30 p.m.	Feedback and Discussion of Practice 2
2:30 p.m. – 2:45 p.m.	Break
2:45 p.m. – 3:25 p.m.	Power Point Discussion
3:25 p.m. – 4:00 p.m.	AMTC Procedures and Requirements
Fourth Day	
9:00 a.m. – 9:20 a.m.	Overview of Day 3
9:20 a.m. – 12:30 p.m.	Practice Moderating 3 (Class 9)
12:30 p.m. – 1:00 p.m.	Feedback and Discussion of Practice 3 (Class 9)

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AMTC ADDRESS/TELEPHONE/EMAIL/STAFF

Address

International AMTC

LIMRA

300 Day Hill Road

Windsor, CT U.S.A.

06095-4761

Telephone

(860) 298-3906

Email

thecentre@limra.com OR CIAM@limra.com

International AMTC Staff

<Insert Staff Name Here>

<Insert Staff Title Here>

<Insert Staff e-mail address Here>

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PROFILE OF THE IDEAL AMTC MODERATOR

Probably the **most critical step** in the AMTC organization process is **selecting the right moderator!** The most qualified person will make the class function smoothly and effectively, and attract students. This applies to a single moderator class as well as a class that has multiple moderators.

Listed below are some of the characteristics of an ideal potential moderator. We seek a person who:

1. Has a high degree of personal and professional integrity

2. Is a **well-respected, responsible agency head** leading one of the best agencies in the local community, as evidenced by having earned such things as industry designations (such as CIAM, LUTCF, CLU, ChFC, or CFP), holding office in industry associations, and winning company and industry awards (International Quality Award, MDRT, company top honor, and others)

3. Is **able to lead effective discussion** and **conduct meaningful skill development sessions**. In addition, the person must be able to communicate ideas in a discussion format and help attendees transfer those ideas into action

4. Is **willing to follow the AMTC moderator guides and class procedures**, so that the class effectively helps attendees develop their sales management skills and get the maximum possible value from the class

5. Is **available to lead the AMTC class for** his or her assigned sessions or the vast majority of the **23 class sessions**

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MODERATOR RESPONSIBILITIES

The **major responsibilities** of an AMTC moderator are the following:

1. **Attend** an AMTC **Moderators' Conference;**

2. **Carefully prepare** to lead each class session;

3. **Moderate each class session,** or arrange for a substitute moderator;

4. **Evaluate and assign grades for student Action Projects and Planning Projects;**

5. **Encourage and maintain students' enthusiasm** for completion of all course requirements;

6. **Follow the AMTC Moderator Guides and class procedures so** that the class effectively helps **students develop their sales management skills;** and

7. **Submit reports to the AMTC staff** to maintain student records, and administer class activities.

Based on previous experience, it is a good estimate that doing these activities will take the following amounts of time:

1. Preparing to moderate — two to four hours per class;

2. Moderating — three to four hours per class;

3. Reviewing and grading projects — one to three hours per class; and

4. Miscellaneous — one hour per class.

Thus, the moderator is being asked to make a **commitment of seven to 12 hours per class**! Even though this may seem a bit overwhelming, the benefits of moderating more than compensate for the time invested. A moderator:

- Always learns from the students

- Develops new skills along with the students

- Develops poise and confidence in presenting before groups

- Feels a deep sense of satisfaction watching students grow under his or her leadership

- Can qualify for Step B toward the CIAM designation

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FINDING SUITABLE CLASSROOM SPACE

One of your major responsibilities is to make sure you have classroom space for your AMTC class and secure its use. The following guidelines should help you:

1. The classroom must be **large enough for 15 to 20 people** to sit comfortably in a **U-shape or classroom-style seating.**

   In addition, there must be some **flexibility to rearrange** the seating for skill development practice and/or small-group discussions.

   An illustration of this ideal room arrangement is at the bottom of this page.

2. There must be a **Writing Board and/or a Flip Chart** for use by the moderator and attendees.

3. Since **video segments are a critical part of the course, a monitor and projector should be available.** (Please consider using audio only as a last resort; it is much less effective and the attendees will not get as much value from the class.)

4. The classroom must be **available for all 23 weekly** three-hour sessions.

5. **In addition to the above,** a number of other characteristics are desirable, **such as privacy, good lighting and ventilation, parking, access to restrooms, and proximity to refreshment and lunch facilities.**

Ideal Room Arrangements for AMTC
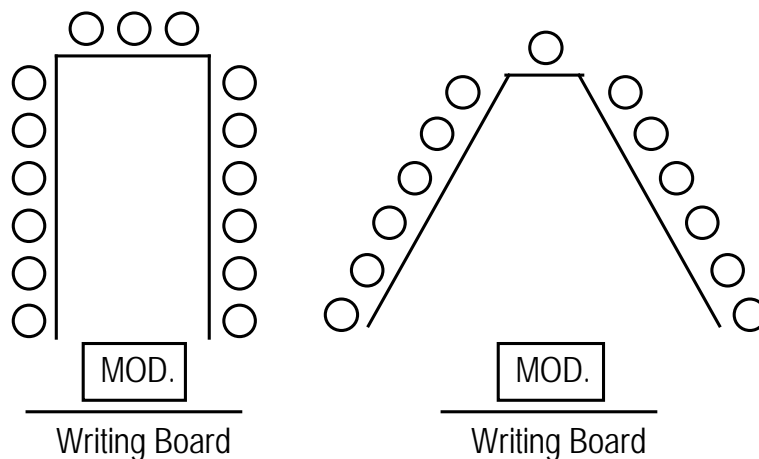
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CLASS VISIT FEEDBACK

As a visitor to an AMTC or FMS class, you have a unique perspective on class activities and the interaction between the moderator and class members. Please share your insights and observations by completing the questionnaire below. Your input will be very valuable, as an additional viewpoint on how to help the AMTC achieve its objective of developing and enhancing sales management skills. Thank you for your assistance!

Please Print

_____ _____ _____
Your Name   *Company*   *Title*

Mailing Address: _____
                              Street Address   *City*   *Province*   *Country or Code*

Capacity in which you visited class (check as many as apply):

___ AMTC Coordinator   ___ CIAM Advisory Council Member

___ LIMRA International Staff   ___ Home Office Executive

___ Other _____

Class Visited   **Location**
___ AMTC   ___ FMS   _____
                                                        City   *Meeting Place*

Moderator's Name: _____

Date of visit: _____ Number of students in attendance: _____

Main topics discussed in class: _____

_____

_____

_____

Please check how you feel about each of the following statements:

1. In general, the class members were enthusiastic and interested in the topics covered in this session.

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

2. In general, the class members were eager and willing to participate in the class discussion and role-play.

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

3. There was a good discussion of the assignments due for this class (the reading assignment, Action Project, audio listening assignments, or Planning Project [if applicable]).

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

4. Concerning the new topics for this class, the moderator did a good job of guiding the discussion so the main ideas and skills were fully explained and understood.

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

5. The moderator encouraged and obtained participation from all class members.

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

6. The video segment(s) played in this session did a good job of demonstrating appropriate management skills.

   ❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

7. The audio segment(s) played in this session did a good job of communicating appropriate management principles, ideas, and concepts.

❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

8. The moderator and class members used correct techniques to do skill development role-play and feedback.

❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

9. The role-play and feedback helped the class members develop their management skills in crucial areas.

❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

10. Based on my observations, I would recommend this moderator to potential students who might enroll in future AMTC/FMS classes.

❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

11. Based on my reactions to this class, I would recommend the AMTC/FMS program to other potential students, either in my company or community.

❑ Strongly Agree   ❑ Agree   ❑ Not Sure   ❑ Disagree   ❑ Strongly Disagree

12. Do you have any additional comments or suggestions regarding any aspect of this AMTC/FMS class, the moderator's job, classroom, or course materials?

_____

_____

_____

13. Are there any other comments you care to make about the AMTC/FMS program in general?

_____

_____

_____

14. May we refer to your observations when we contact others with a direct interest in the AMTC? ❑ Yes ❑ No

Comments or exceptions? _____

_____

Thanks again for your help!

Please email this questionnaire to:

International AMTC

LIMRA

300 Day Hill Road

Windsor, CT 06095-4761

U.S.A.

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MULTIPLE MODERATOR CLASSES

A multiple-moderator class differs from a single moderator class. Below are suggestions on how to make multiple moderator classes work most effectively.

1. **Multiple moderators are a team** and should meet and communicate often. Because there are multiple people involved in teaching your class, it is sometimes unclear who is doing what. All moderators should be aware of exactly what is going to happen in the class.

2. **All the moderators should attend the orientation class** so they all can be introduced to the students. When a new moderator takes over, he or she should be reintroduced to the class.

3. **Each moderator should be responsible for conducting the class sessions for at least one whole content area** (planning, recruiting, selection, training, and performance management). This will help ensure that the students receive consistent information for the major parts of the AMTC. Do not break up the course so that one moderator does a couple of classes with another one doing a couple more in the same content area. This will cause confusion among both the moderators and the students!

4. **Inform the students before the class actually starts that there will be multiple moderators**. Before classes begin, what the students can expect must be well-explained. There should not be any surprises.

5. **All moderators should be committed** to making your AMTC class successful!

6. **Please make sure that each moderator knows what the other moderators are doing**. Each moderator must be very clear as to how to conduct classes. If one moderator is doing something in a particular way, it is important that the other moderators follow the same procedure. Otherwise, students may become confused. For example, if one moderator is grading the action projects and planning projects in a particular way, the other moderators should grade the projects in the same fashion.

7. **Assure a good transfer of responsibility for the course from one moderator to another** by having the upcoming moderator either be a student in the class, or attend one or two classes before taking over. This kind of continuity is important not only from a moderator's point of view in understanding what is going on in the class (the atmosphere and procedures), but also from the point of view of the students themselves, so they understand who will conduct future classes.

8. **When a new moderator takes over the class, there will be an initial period in which they will have to establish their own rapport** with the students. At the beginning, moderators should be prepared for a little less class discussion, and perhaps a little testing from the class to see what the moderator will and will not allow.

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CLASS SCHEDULE

The AMTC has 23 class sessions. Each is three hours in length. Listed below are the class session titles and a blank for you to fill in the dates for your chosen day of the week during which these class sessions will be held.

Enter below the day and time of your class. Also enter the moderator's name for each class session, **only** if your class has multiple moderators.

Day _____ Time _____

Actual Class Date	Class	Moderator	Class Session Titles
_____	1	_____	Orientation
_____	2	_____	Planning Culture, Mission, Philosophy, and Planning
_____	3	_____	Planning Annual Planning and Individual Annual Reviews
_____	4	_____	Recruiting Creating an Agent Referral System
_____	5	_____	Recruiting Recruiting Through Warm Nominators
_____	6	_____	Recruiting Recruiting Through Cultivating Nominators and Personal Activity
_____	7	_____	Recruiting First Contact With Recruits
_____	8	_____	Recruiting Other Recruiting Methods
_____	9	_____	Selection The Initial Interview
_____	10	_____	Selection Communication of Test Results and the In-Depth Interview
_____	11	_____	Selection The In-Depth Interview (continued)
_____	12	_____	Selection Reference Checking and the Career Presentation
_____	13	_____	Selection The Job Sample
_____	14	_____	Selection Finalizing Mutual Commitments and Skill Reinforcement

Actual Class Date	Class	Moderator	Class Session Titles
_____	15	_____	**Training** Training for Results
_____	16	_____	**Training** Drill, Rehearsal, and Role-Play
_____	17	_____	**Training** Training Through Joint Work
_____	18	_____	**Training** Agency Meetings, Conferences, and Clinics
_____	19	_____	**Performance Management** Creating an Activity Management System
_____	20	_____	**Performance Management** Using Your Activity Management System
_____	21	_____	**Performance Management** Problem-Solving Meetings
_____	22	_____	**Performance Management** Planning and Implementing Individual Improvement
_____	23	_____	**Planning** Planning the Future

RESOURCES

VIDEO/AUDIO MESSAGES

Video and audio messages are an integral part of the AMTC curriculum. The following will be used by class either in class or as an assignment for class:

Class #	Audio/Videos	In Class	Assignment
1	Orientation — "Welcome to the AMTC"	X	
3	"The Importance of Agency Planning"		X
3 & 4	"Conducting an Agent Referral Meeting"	X (4)	X (3)
4	"Recruiting's Key Role"	X	X
4	"Setting Up a Referral Meeting with Your Agents"	X	
5	"Creating a Network of Nominators"	X	
5	"Building a Foundation for Recruiting with Agents"		X
5	"Turning Policy Owners into Nominators"		X
7	"How to Make Initial Contact with a Candidate"	X	
8	"Recruiting on Joint Calls With Agents"		X
8	"Conducting Recruiting Seminars"		X
8	"A Simple Recruiting Idea"		X
9	"Some Thoughts on the Selection Process"		X
9	"The Initial Interview"	X	
10	""Communicating Selection and Assessment Results"	X	
11	"Tips on Interviewing Candidates"		X
11	"Segments of the In-Depth Interview"	X	
12	"Checking References"		X
12	"The Career Presentation"		X
13	"Job Sampling"	X	
14	"Finalizing Mutual Commitments"	X	
15	"Training, Talent and Time"		X
15	"PESOS in Practice"	X	
16	"Effective Role-Play"	X	

Class #	Audio/Videos	In Class	Assignment
17	"Previewing and Reviewing a Joint Call"	X	
18	"The Importance of Agency Meetings"		X
19	"Analyzing Agent Performance"	X	
20	"Coaching Versus Counseling"	X	
21	"Helping Agents Deal With Personal Situations"	X	

LIMRA is excited to announce that we offer digital course materials to support all AMTC classes. Through this initiative, LIMRA is able to provide greater flexibility and options on how course materials are delivered and access by course participants and moderators. By going digital, we are addressing the growing demand for digital learning content from our customer and course participants globally, and meeting LIMRA's green initiatives in minimizing environmental impact.

What are the exciting features and benefits that our digital materials will bring to you?

- Ability to view course materials on the device of your choice, including laptops, tablets and other mobile devices

- A self-directed/self-paced system where learning can happen anywhere and at any time

- Comprehensive and real time course content updates

- Ease of access to course materials before, during and after class

- Easy-to-navigate and interactive course materials which allow the addition of personal electronic notes, highlights and bookmarks to aid you and your student's learning

Digital materials provide more flexibility in complementing and meeting our member company's organizational training needs through a blended learning approach, providing your students with learning materials and tools quickly in the moment of need.

To access these digital materials throughout the AMTC, watch out for our *LIMRA QR Code* or *Bit.ly URL Address* (shown below) and use your personal computer or personal device of choice to lead you to the materials available relative to the content topic.

http://bit.ly/AMTC_Moderator_Resources

See more information in your Moderator's Guide on how to access digital content using a QR Code.

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REPORT OF STUDENT TRANSFER

(PLEASE PRINT OR TYPE)

This form will facilitate the transfer of a student from one AMTC class to another.

Student Transfer Instructions

Previous Moderator

1. Contact AMTC by mail or telephone to obtain AMTC class information for the transfer student's new location. We will provide the name, address, and telephone number of the new moderator.

2. Ask the transfer student to make contact with the new moderator.

3. Complete the "Previous Moderator Information" and "Transferring Student Information" below. Fill in all attendance, grade, and project information on the chart below. Make two copies. Send one to the new moderator and the other to AMTC. Be sure to include all attendance and project grade information for the student prior to transfer.

New Moderator

1. When a new student transfers into your class, complete the "New Moderator Information." Fill in any missing "Transferring Student Information," including the student's new address.

2. Send this form to the AMTC.

3. Add the name of the transfer student to your Student Record Report. List him or her as a transfer and record all previous attendance and project grade information when you receive it from the previous moderator.

Previous Moderator Information

_____   _____   _____
Your Name   *Class Location*   *Date*

_____   _____
Company   *Moderator's Mailing Address*

Transferring Student Information

_____   _____   _____
Student's Name   *Date Entered Class*   *Session*

_____
Company

_____
Student's New Mailing Address

New Moderator Information

_____   _____   _____
Your Name   *Class Location*   *Date*

_____   _____
Company   *Moderator's Mailing Address*

Class	Date	Attendance	Action Projects	Grade	Planning Projects	Grade
1			1		Recruiting	
2			2			
3			3		Selection	
4			4			
5			5		Training	
6			6			
7			7		Performance Management	
8			8			
9			9		Summary Planning Project	
10			10			
11			11			
12			12			
13			13			
14			14			
15			15			
16			16			
17			17			
18			18			
19			19			
20						
21						
22						
23						

Mail to:

International Class Coordinator

International AMTC

LIMRA

300 Day Hill Road

Windsor, CT 06095-4761

U.S.A.

Phone: (860) 298-3948

REPORT OF STUDENT VISIT TO ALTERNATE CLASS LOCATION

Please complete the information below if you, as an AMTC student, are unable to attend your regular AMTC class and can attend an alternate class **(the same class session),** in order to meet your attendance requirement.

To be completed by the student:

_____   _____   _____
Student's Name   *Company*   *Regular Class*

To be completed by alternate moderator:

_____   _____
Class Number   *Title*

in_____   _____
City, Country   *Date*

The student must submit any assignments due and return this signed form to his or her regular class moderator.

_____
Alternate Moderator

_____
Date

CURRICULUM DESCRIPTION

AMTC classes run for three hours and are organized into the following parts:

Topic	Suggested Time
■ Skill reinforcement and discussion of assignments due, such as Action Project, reading, or competency checkups	30 minutes
■ Presentation and discussion of today's ideas, methods, and skills	60 minutes
■ Skill development through role modeling and role-play	75 minutes
■ Assignment of Action Project or reading	15 minutes

Outlined below are the curriculum subjects covered in each of the AMTC class sessions:

Session	Title	Description
1	Orientation	An introduction to course content, procedures, and objectives, as well as confirming student's intentions to successfully fulfill course requirements
Planning		
2	Culture, Mission, Philosophy, and Planning	Identifying the unit/agency culture, developing a mission and philosophy, and implementing a planning process
3	Annual Planning and Individual Annual Reviews	How to create an overall annual plan directed toward achieving defined goals and objectives, and developing skill in helping agents review performance and plan future goals and objectives
Recruiting		
4	Creating an Agent Referral System	How to develop a recruiting plan and implement the use of an agent referral system as a key recruiting skill
5	Recruiting Through Warm Nominators	How to use people students already know well to obtain the names of recruits
6	Recruiting Through Cultivating Nominators and Personal Activity	Helps a manager develop people who are known casually into valued sources of recruits' names and identifies more opportunities for a manager to recruit through personal contact
7	First Contact With Recruits	Creates a recruiting system and demonstrates how to use the three methods of initiating contact with a candidate
8	Other Recruiting Methods	Discussion and explanation of how to recruit using other techniques such as advertising, employment agencies, seminars, campus recruiting, and recruiting specialists

Session	Title	Description
Selection		
9	The Initial Interview	An overview of selection principles and procedures, as well as how to prepare for and conduct the first face-to-face meeting with a recruit
10	Communication of Test Results and the In-Depth Interview	How to present selection test results to a candidate, and a discussion of the purpose, value, definition, and preparation necessary to conduct the in-depth interview(s)
11	The In-Depth Interview *(continued)*	Develops interviewing skills by using structured interview guides and observing interviewing rules
12	Reference Checking and the Career Presentation	Gets recruits to give you the names of references that can provide valuable selection information and develops skill in interviewing those references. Develops an individualized career presentation and gains skill in making career presentations to the candidates.
13	The Job Sample	Creates a job sample program to help a manager select agents, as well as develop skill in explaining and using the results from a job sample
14	Finalizing Mutual Commitments and Skill Reinforcement	Uses the discussion with a "Very Important Person" as a way to describe the agent's job, and to enhance the mutual selection process. Also, reach a selection decision, discuss it with a candidate, and prepare to assimilate the person into the agency. Last, an opportunity to review skill development so far in the AMTC and receive additional help in improving one's planning, recruiting, and selection skills.
Training		
15	Training for Results	Explain the meaning and purpose of PESOS and applying it to meeting a manager's training objectives. Also, focus on how to write training objectives and develop programs that meet these objectives.
16	Drill, Rehearsal, and Role-Play	How to use role-play effectively as a training technique and develop skill in conducting role-play training sessions
17	Training Through Joint Work	Develop skill in using joint work as a training technique (for example, how to preview a call, demonstrate or coach, and review the call)
18	Agency Meetings, Conferences, and Clinics	Distinguishes between these three approaches to training and developing skill in using each as a way to achieve training objectives
Performance Management		
19	Creating an Activity Management System	An overview of performance management principles and methods, plus how to analyze records of agents' activity as a step in the performance management process
20	Using Your Activity Management System	Develops the skills of planning for and conducting activity review meetings with agents
21	Problem-Solving Meetings	A discussion of performance deficiencies resulting from personal and/or motivational problems faced by agents. In addition, there will be skill development in how to conduct meetings designed to help agents handle these problems.
22	Planning and Implementing Individual Improvement	A presentation and discussion of how to diagnose performance deficiencies and use the performance management process to individually design a development program for each agent

Session	Title	Description
23	Planning the Future	Implementation of AMTC principles and processes for the future growth of the manager and his or her managerial unit

To achieve the objectives implied in the above descriptions of each class session, the AMTC uses discussion, reading assignments, action projects, planning projects, video and audio demonstrations, and role-play.

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COMPLETION REQUIREMENTS

To be recognized as an AMTC graduate, a student must complete the following requirements:

1. **Attend the Orientation class session** (or a makeup Orientation session arranged by the moderator for those students who cannot attend the originally scheduled Orientation class session).

2. **Attend 18 of the 23 class sessions**.

3. Receive a **grade average of 75 percent or higher** on the Action Projects and Planning Projects, including the Summary Planning Project, as graded by the class moderator.

4. **Submit the Summary Planning Project** to his or her direct supervisor. This person must review this plan and send notification of its completion to the AMTC coordinator.

When these course completion requirements are met, the student will be recognized as an AMTC graduate and receive credit for Step B toward the CIAM designation.

Moderators may receive credit for course completion by meeting the same attendance requirement as regularly enrolled students. When not acting in the role of moderator, he or she must meet all regular student requirements as outlined above.

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STUDENT RECORD REPORT

It is extremely important that all attendance and project grade entries be made **accurately in ink weekly.** This completed report is the AMTC's primary permanent student record. Entries are considered complete, accurate, and final when received by AMTC. Your students' pass or fail status is determined from this report and completion of the Summary Planning Project.

NOTE: Multiple moderators should record grades on only one Student Record Report.

Class City	State	Province	Country
			Is student credit desired for this moderator?

			Yes	No
Moderator's Name	Company	Telephone	☐	☐
Moderator's Name	Company	Telephone	☐	☐
Moderator's Name	Company	Telephone	☐	☐
Moderator's Name	Company	Telephone	☐	☐
Moderator's Name	Company	Telephone	☐	☐

- -

For AMTC staff use

Number of Enrolled Students

Number of Graduates

**International AMTC
LIMRA
300 Day Hill Road
Windsor, CT 06095-4761 USA
Phone: (860) 298-3941
Email: TheCentre@limra.com**

Instructions for Use

1. In English, alphabetically print or type each student's last name, first name, and company.

2. Enter the dates of your class sessions on the row opposite "Date" and enter the "date due" for each Action Project and Planning Project.

3. Record Attendance — Each week, record an "X" (for present) or an "A" (for absent) for each student in *ink* in the column below the date for that class session.

4. Record Grades — Each week, record your **numerical** grade (i.e., 100 percent, 85 percent, 50 percent, or 0, for example) for each student in the column below the date the project is due. Enter zeroes for projects that are not turned in. Letter grades or checkmarks are not acceptable.

5. Complete Overall Summary — Two to three weeks after your last AMTC class session (23), you should have received the Summary Planning Project from all of the students. Grade this project and enter your numerical grade in the appropriate column. Then, take the following steps for *each student:*

   a. If the student did *not* attend the Orientation Class 1 (or your makeup Orientation class session), place a check, ✓, in the column under (1) "Total Absences" in the Overall Summary.

   b. Add the number of "A's" in the row for a student and enter this total. The result is the number of absences for the student. Enter this number in the column under (1) "Total Absences" in the Overall Summary.

   c. Add your **numerical** grades for all of the Action Projects together; **be sure to include zeroes for any assignment not completed.** Divide this sum by 19, the total number of Action Projects assigned. Enter this *average* in column (2) "A.P. Grade Average" in the Overall Summary.

   d. Add your **numerical** grades for all of the Planning Projects together**; be sure to include zeroes for any project not completed.** Divide this sum by 5, the total number of Planning Projects assigned. Enter this average in column (3) "P.P. Grade Average" in the Overall Summary.

   e. Complete the Noncompletion Information for any students who didn't complete the course.

   f. **PHOTOCOPY THIS STUDENT RECORD FOR YOUR RECORDS.**

g. Put the following items together and send them no later than four weeks after the last class to the AMTC Coordinator of your company or organization:

- This AMTC Student Record Report
- A typed listing of the student names as you would like them to appear on the completion certificates
- AMTC Course Evaluation Questionnaire completed by you

h. AMTC Coordinator, send this Student Record Report to LIMRA immediately.

AMTC Completion Requirements

To be recognized as an AMTC graduate, a student must complete the following requirements:

1. Attend the Orientation class session (or a make-up Orientation session arranged by the moderator).

2. **Attend 18 of the 23 class sessions.**

3. Receive a grade average of 75 percent or more on the Action Projects and Planning Projects, including the Summary Planning Project, as graded by the class moderator.

   In addition, the Summary Planning Project must be sent by the student by his or her direct supervisor. This person must review the plan and send notification of its completion to the AMTC Coordinator.

Attendance			Mark:	"X" for Present						
				"A" for Absent						
		Class Number	1	2	3	4	5	6	7	
Student Name	Company	Date								
John Doe (sample)	ABC Life		X	X	X	A	X	X	A
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									
11.									
12.									
13.									
14.									
15.									
16.									
17.									
18.									
19.									

8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
X	X	X	X	X	X	A	X	X	X	X	X	A	X	X	X

Enter numerical grades for each student in spaces below.

Action Projects																			
Project Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19
Date Due																			
	92	85	95	75	100	91	88	82	95	78	88	93	80	92	85	95	98	80	75

Note: For further reference, please put a small (✔) in the square for any project that is handed in to you late.

Planning Projects					Overall Summary			
Recruiting	Selection	Training	Performance Management	Summary Planning	(1) Total Absences	(2) A.P. Grade Average	(3) P.P. Grade Average	(4) AMTC Staff Use
85	90	100	75	95	4	88	89	
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								
11.								
12.								
13.								
14.								
15.								
16.								
17.								
18.								
19.								

For AMTC staff use:
P = Pass
— = Incomplete

Noncompletion information

Please enter the following information for any student who was enrolled but did not complete the course requirements.

	Student Name	Company	Date of Last Class Attended	Reason for Noncompletion: (Left Management, Was Transferred By Company, or Poor Attendance, for Example)
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				