



LIMRA Talent Solutions International
Agency Enhancement Series (AES)

Designed for senior sales managers who want to enhance their agency organizations by adopting advanced practices in recruiting, developing, and promoting sales agents

This program focuses on advanced strategies that enhance skills used daily by sales managers to lead their teams. The curriculum provides best practices and techniques for adopting these enhanced strategies, helping senior sales managers improve recruiting results, create a team of Million Dollar Round Table (MDRT) producers, and promote talented agents into sales management roles.

The series comprises three hands-on, highly interactive courses. Participants must complete all three to meet a requirement for achieving the Chartered Insurance Agency Manager (CIAM) designation.

Courses can be delivered by a LIMRA Certified Instructor or by a LIMRA-certified company in-house trainer. Each course is approximately seven-and-a-half hours in content length. Making effective and efficient use of agency resources to achieve key performance indicators (KPIs)

Recruiting To and From Target Markets

To reach agency growth goals in today's highly competitive business environment, managers must know and implement effective strategies for attracting and recruiting high potential, targeted agents. This course features the latest recruiting research, best practices, and techniques for penetrating specific target markets and for recruiting highly productive agents to your organization.

Identifying Markets in Which to Position the Opportunity

Participants will be able to identify future target markets and sourcing opportunities by analyzing the sources and effective practices of successful new agents on their sales teams.

Best Sources of Quality Candidates and Successfully Approaching Candidates

Participants will be able to connect with target markets and sources that can support and promote their career opportunities. Participants will identify several viable target markets; will be prepared to contact and connect with targeted candidates/markets; and will master improved techniques for motivating them to explore a career in insurance/financial services sales.

Selecting Candidates From Markets

Participants will acquire enhanced techniques for attracting quality candidates to the recruiting and selection processes and evaluating the qualities and market affinities that contribute to career success.

Successfully Transitioning Your Recruits Into Their New Careers

Participants will be able to support processes, systems, scripts, and tools for successfully transitioning targeted recruits to their new sales careers

Keeping the Recruiting Pipeline Filled With Quality Candidates

Participants will conclude the course by focusing on creating systems to support steady flows of targeted candidates into their recruiting pipelines.

Developing Your MDRT Agents

Sales managers are the key to developing successful, highly professional agents. They must continually raise the bar to create a team of Million Dollar Round Table (MDRT) producers who demonstrate exceptional professional knowledge, strict ethical conduct, and outstanding client service. In this course, participants will learn how to drive the successful growth of their sales agents to new levels of achievement.

Culture First!

Participants will define a new MDRT culture for their sales units and set new expectations to help their sales agents reach and maintain MDRT status. Participants review their agencies' brands, visions, and mission objectives and realign them with their new culture. They will review MDRT's *Whole Person Philosophy* and complete a *Life Balance Quiz*.

Setting High-Performing Activity Standards

Participants learn to adopt strategies supporting their sales units' new activity levels and develop communication plans generating enthusiastic acceptance of these new standards. Participants learn ways to promote an MDRT culture within their sales organizations and support weekly and monthly sales-unit-status reports of agent achievement.

Providing Development Opportunities

Participants learn how to implement a training and development plan that helps agents attain MDRT status. Participants create individualized development plans for their agents and learn the *Eight Best Practices* to help agents build their businesses, brainstorm innovative best practices, and become a *Student of the Industry*. Participants also learn to provide effective reward and recognition programs.

Leading Your MDRT Agents

MDRT's mentoring program is introduced. Participants learn to measure, monitor, and manage their agents' successes through use of coaching interventions and mentoring opportunities. They review the Five-Step coaching process and engage in a *Business Planning Interview* role-play and *1:1 Coaching Session* role-play with an agent. Participants also review mentoring and mentoring relationships.



Building Your Business Through New Managers

Sales managers play a pivotal role in your company's profitability. Choosing the right people for this job will boost sales agent productivity and retention — but choosing the wrong candidates can do serious harm to productivity and morale. Research shows that most sales managers are “promoted” agents. Unfortunately, great agents do not necessarily make great sales managers. In this course, sales managers will learn how to effectively identify and develop individuals who can carry out the key responsibilities of recruiting quality candidates, positioning them for a fast start, and instilling the sales processes, procedures, and approaches that will lead to new agent success.

Role of a Sales Manager

Working in groups, participants identify the key tasks and functions of the sales-management position. They identify a common set of expectations for all sales-manager candidates and discuss the importance of building an agency through the promotion of new sales managers. These discussions help define the quality of leadership and develop the profile of a successful manager.

Identifying and Assessing New Managers

This module demonstrates how to identify and assess potential sales managers. The opportunity to *try on* the management role is explored. Participants discuss the strengths and development needs of potential sales managers.

Equipping New Sales Managers for Success

Participants analyze the training and development needs that support new sales managers. Working together, they develop a *Prior to Appointment Launch Plan* to support new manager success. Additionally, participants create formal learning tracks based on their companies' paths to sales management.

Managing Your New Sales Manager's Performance

Participants determine how to help potential sales managers meet their companies' appointment requirements and promotion criteria.

The Sales Manager's Crucible

This module is a game simulation in which participants attempt to identify candidates to recommend to their agency managers for participation in their *Sales Manager Development* programs.

***Courses can be purchased individually or as a series.
Speak with your LIMRA Consultant today to learn more about how to generate
higher levels of sales performance!***

