



Daily Narrative

You have so many tasks and responsibilities to perform as a manager. You must manage your time effectively; plan for and run your team to optimize its performance; and recruit and select new agents while retaining and developing your current agents for long-term profitability!

This four-and-a-half-day program focuses on improving manager performance in today's environment and developing critical management skills for those in their first two years.

The program will help you:

- Construct and implement an agency action plan
- Improve recruiting techniques and results
- Formulate better selection practices, processes, and tools
- Enhance agent training and development
- Determine what motivates agents to help them improve job performance and accountability
- Set performance standards to manage effectiveness and efficiency

Who should attend?

Sales managers, unit managers, district managers, and agency managers who are in their first two years of their management career who have previous experience as an agent and want to orient themselves with the skills and processes necessary for successful management of their organizations.

Program Overview

Pacesetter's program covers the processes of successful sales management; broken down by subject area. Each day focuses on developing critical skills for an area and reflecting on building upon skills learned and practiced in the previous days. All content is based on LIMRA research and best practices of the best sales managers, globally.

Pre-Program Assignment

To get the most real-life benefit from attending the program, you need to come prepared. You will complete an Agency Profile form, outlining your current agency recruiting, retention, and productivity statistics, your agency training curriculum, and thoughts on what major challenges your agency will be facing in the coming years that need to be planned for so you're ready to hit the ground running when Day 1 begins.



Pacesetter

Day 1: Planning and Goal Setting

You will learn general information about the Pacesetter program before turning your focus to agency management responsibilities for operational planning and organizational effectiveness. It begins with the Management Process where we discuss management job activities and identify the differences between current costs and capital investments, before planning and problem solving. The afternoon finishes with time management, delegation strategies and defining an agent's job description to prepare you to recruit and select the right agent talent.

Day 2: Recruiting and Selection

In the next phase of the management process, you will begin using past agency performance to set your agent and production planning objectives before looking at various recruiting methods, selection concepts and tools to support you with identifying and selecting the right candidate. Day 2 concludes with creating your own Recruiting and Selection Action Plan for implementation upon your return.

Day 3: Developing Agents

Now that you have the right person recruited, how do you get him/her to be a productive agent? By applying the principles of adult learning and learning styles, you can implement your own training strategy to support the professional development of your agent team. Using the right coaching techniques will help ensure your agents are reaching their goals and achieving success. Day 3 ends with application of what you learned so far to analyze a fictional agency to create a multi-year plan for your agent's retention and productivity.

Day 4: Managing Performance

Creating your *New Agent 1st Year Training Action Plan* for developing your agents will be the focus this morning. Then, you will use a job performance model to determine what motivates your agents so you can properly support the coaching model as a performance management tool. Most Day 4 will be spent implementing the objectives and goals you created through your analysis of the Anytown Agency at the end of Day 3.

Day 5: Bringing It All Together!

What was the result of the Anytown Agency simulation? The morning of Day 5, each team will present their Business Unit Action Plan from the simulation exercise on Day 4. The large group will discuss what went well and what could have been improved. The program concludes with you evaluating the experience, reviewing the key points of the Management Process and your adoption plans, and next steps regarding the Post-Program Projects required for you to receive program completion status from LIMRA.

Post-Program Assignment

Within 30 days after the Pacesetter program, you will finalize your action plans - started during the program - to improve your recruiting, selection effectiveness, retention, and productivity of your new agents. Upon completion of your projects, you will meet with your supervisor and obtain approval to implement your plans.