

Integrated Leadership Practices - Program Description

Program Goals:

The program is an introduction to field leadership. The target student has been in a field leadership position for less than 3 years. The purpose of program is to accelerate their learning curve. The course is designed to deliver core competencies:

- Coaching
- Recruiting
- Selection
- Planning
- Performance Management
- Training and Development

Key Differentiators

In addition to the core skills required of a new field leader, the unique aspects of this program are:

- Current information regarding technology and the diverse marketplace
- 12 weekly 1.5 - 2 hours sessions focused on interactive application
- Delivered in a live, interactive, online format. System allows for:
 - 2-way audio
 - 2 way text
 - online study – no need for textbook, students print only what is needed
 - no travel cost
- Progress checkpoints to ensure interactive learning application
- Case studies
- 1-3 hours of homework, exercises, discussion preparation, and checkpoint projects, per week to enhance knowledge retention
- Follow-up coaching at 3 and 6 months to ensure program goal application

We anticipate that completion of the entire 12 week course will receive CLF course credit.

Module Titles and

- I. Leading in a Changing World
 - a. What is a field leader
 - b. Leadership competencies
 - c. Culture of success
 - d. Vision, Mission, Values
 - e. Importance of clear expectations
 - f. Value Proposition
 - g. Technology
 - h. Generations, cultures, genders

- II. Coaching
 - a. The coaching concept
 - b. Coaching and counseling
 - c. Levels of coaching
 - d. The coaching process – how to
 - e. Communication skills

- III. Agency Business Plan
 - a. Components of a plan
 - b. The plan as a direction setting tool
 - c. Field leader expectation
 - d. The business owner mindset
 - e. Results based time management

- IV. Recruiting
 - a. The recruiting concept
 - b. The ideal candidate profile
 - c. Multi-channel recruiting
 - d. Recruiting to teams

- V. Tracking, Screening & Selection
 - a. Tracking recruiting ratios
 - b. Initial screening process
 - c. The selection process
 - d. The career presentation
 - e. Structured Interviews
 - f. Pre-contract/pre-appointment phase
 - g. Your recruiting plan

- VI. 1st-Half Recap/Case Study

- VII. Performance Management
 - a. Performance management concept
 - b. Expectations
 - c. The performance contract
 - d. Activity management
 - e. The fast-start
 - f. Study groups

- VIII. Training
 - a. Accountability
 - b. Dramatic approach to training
 - c. Maximizing the value of classroom training
 - d. The training schedule
 - e. Joint work as the most effective training tool

- IX. Agent Business Plan
 - a. Importance of planning
 - b. Controlling the controllables
 - c. Value Proposition
 - d. Client Segmentation
 - e. The sales cycle
 - f. Creating a business plan summary for daily use

- X. Retention
 - a. Importance of retention
 - b. Diagnosing representative losses
 - c. Second and third year losses
 - d. The retention strategy
 - e. Leader's impact on retention
 - f. Importance of long-term development

- XI. Ethics
 - a. Importance of ethical behavior
 - b. Reasons for ethical failure
 - c. Compliance/Law/Ethics – a comparison
 - d. Implementing an ethical decision making process

- XII. Business plan and case study final project review