

# The Five Elements of Leadership Course Outline

## Introduction

Getting Started with FSLEdNet

## Leader's Philosophy

The Power of Encouragement Series  
    The Power of Encouragement  
    Getting Buy-in From Others  
The Dangers of Sarcasm for a Leader  
Growth of a Leader Series – 5 sessions  
    A Passion to Build Others – Part One  
    A Passion to Build Others – Part Two  
    Transitioning from Micro-Manager to Leadership  
    The Multiplying of Leaders  
    Growing by Adding Other Leaders  
Belief in the Products  
The Golden Rule is the Best Rule for Business  
Lead from the from – Get Out of That Ivory Tower  
Planning Your Legacy of Success  
Leadership from a Legend

## Foundational Principles of Leadership

### Foundational Principles – General

Roles and Responsibilities of a Leader  
Avoid Perfectionism to Lead Others  
Invest in Your Business  
How the Life Wholesalers Needs to Adapt

### Foundational Principles – Visions, Missions, Value Propositions

Delivering a Value Proposition  
Changing Demographics Will Require Visionary Leadership  
Importance of a Mission Statement and Core Values

### Foundational Principles – Office Systems and Processes

Implementing Change  
Time Management Series – 4 sessions  
    Understanding Time Management  
    Time Management Concepts and Practices

Proven Time Management Techniques

Stop Procrastinating

### **Foundational Principles – Controlling the Environment**

Understanding Elements of Trust Series – 2 sessions

Overview of the Element of Trust

Inadvertent Mistakes that Kill Trust

Delegation: The Key to Growth

Creating a Collaborative Culture

Building a Great Company Culture

The Wow Factor-Making Your Office the Ultimate Selling Environment 2 sessions

The Wow Factor – Part 1

The Wow Factor – Part 2

### **Foundational Principles – Utilizing Resources**

Utilizing Company Specialists to Build Your Firm

Utilizing Local Resources to Build Your Firm

## **Recruiting Process**

### **Recruiting Process – General**

The Three Stages in the Recruiting Process

The Finding Stage of Recruiting

The Selecting Stage of Recruiting

The Momentum Building Stage of Recruiting

Understanding and Determining a Successful Candidate Profiles

The Unique Needs of Female Associates

Why to Keep a Candidate Profile

Social Media Series

Building Your Online and Social Media Presence

Discovering Qualified Online Candidates

Using LinkedIn to Recruit

Never Be Out of Sight or Out of Mind

Staying Top of Mind with Candidates

Active Candidates vs Recruits – No When to Say No

Nominators

Importance of Follow - Up When You Miss a Recruit

Who Fits Your Firm

Millennials and Baby Boomers Serving Each Other

The Various Types of Independent Candidates

### **Recruiting Process – Finding Stage**

#### **Finding Stage – General**

How to Attract Female Candidates  
Recruiting the Highest Quality  
Early Warning Signs Someone Is Not a Culture Fit

### **Inexperienced Recruiting Candidates**

Attracting Inexperienced Candidates That Are Future Stars Series 2 sessions  
Attracting Inexperienced Candidates That Are Future Stars-Part 1  
Attracting Inexperienced Candidates That Are Future Stars-Part 2  
Developing Your Messaging to Attract Future Top Performers – 2 Session  
Developing Your Messaging to Attract Future Top Performers-Pt 1  
Developing Your Messaging to Attract Future Top Performers-Pt 2  
Profile for Inexperienced Candidates  
Encore Career Candidates  
The Benefits of Reverse Selling  
Show Me - How to Reverse Sell When Recruiting  
Show Me- You Will Be Overworked and Underpaid  
Selection of High Quality Candidates  
How to Conduct an Initial Recruiting Interview  
What Attracting Millennials Can Teach Us about Everyone – 2 sessions  
What Attracting Millennials Can Teach Us about Everyone – Part 1  
What Attracting Millennials Can Teach Us about Everyone – Part 2

### **Independent Experienced Recruiting Candidates**

Profile for Independent Experienced Financial Professional  
A Template for Recruiting Experienced, Independent Life Producers  
What Independent Producers Seek  
Independent Professional: Are They a Fit for Your Firm?  
Sources to Recruit Independent Producers  
The First Impression: Recruiting & Wholesaling Experienced Associates  
The Self-Disclosure - Making a Great First Impression  
Understanding How to Attract Future Top Performers  
Using Brokerage as a Recruiting Tool  
Developing Your Value Proposition Targeting New Independent Hires  
Creating Your Value Proposition for Recruiting Independent Candidates

## **Recruiting Process – Selection Stage**

### **Selection Stage – General**

When to Pass on a Candidate

### **Inexperienced Recruiting Candidates**

Traits of Top Performers – 2 sessions

Traits of Top Performers – Part One  
Traits of Top Performers – Part Two  
Let Them See What It Is Like  
The Benefits of Reverse Selling  
How to Conduct an Initial Recruiting Interview Series  
    How to Conduct an Initial Recruiting Interview - Part One  
    How to Conduct an Initial Recruiting Interview - Part Two  
The Five Handshake Rule Series – 2 sessions  
    Five Handshake Rule - Part One  
    Five Handshake Rule - Part Two

### **Independent Experienced Recruiting Candidates**

How to Screen an Experienced Producer Series – 2 session  
    How to Screen an Experienced Agent - Part One  
    How to Screen an Experienced Agent - Part Two  
Hiring to the Proper Mindset of Inexperienced  
Recruiting the Highest Quality

### **Management Recruiting Candidates\***

Assessing Potential Leaders  
When Someone is Ready to Join Your Leadership Team - Part 1  
When Someone is Ready to Join Your Leadership Team - Part 2  
Signs Someone Cannot Lead - Part 1  
Signs Someone Cannot Lead - Part 2

## **Recruiting Process – Momentum Building Stage**

### **Momentum Building Stage – General**

Keys to Self-Accountability  
Creating High Performance Expectations

### **Inexperienced Recruiting Candidates**

On-Boarding & Assimilating and On-Boarding New Associates  
Momentum Building for an Experienced Hire  
Importance of Joint Field Work  
Benefits of Joint Field Work  
Planning and Debriefing from Joint Field Calls  
Guidelines for Joint Field Work  
How Managers Can Hurt the Pre-Contract Period – Part One  
How Managers Can Hurt the Pre-Contract Period – Part Two

### **Independent Experienced Recruiting Candidates**

On-Boarding Experienced New Associates for a Fast Start

Setting Expectations for New Experienced Associates  
Getting Experienced Producers off to a Fast Start

### **Management Recruiting Candidates\***

Should You Promote Top Sales Performer to Sales Manager

## **Alternative Distribution Process**

### **Alternative Distribution – General**

Overview of FSLEdNet for Independents

### **Alternative Distribution – Wholesaler**

Approaching the Financial Advisor  
Wholesaling to the Independent PPGA  
The Demise of the Steak and Whiskey Wholesaler  
Headwinds That Will Impact Brokerage Firms  
How Brokerage Firms Can Adapt to Headwinds  
Understanding the Assets Under Management Producer  
Pros and Cons of Independent Brokerage Distribution  
Questions to Ask the Financial Advisor or RIA  
Wholesaling to the Independent PPGA  
Approaching the RIA or AUM Specialist

### **Alternative Distribution – Banking**

Your Value Proposition for a Community Bank  
How to Approach Community Banks  
Working with Community Banks  
Obstacles to Doing Business in a Community Bank  
Developing Referrals and Prospects Within a Bank  
Lead Flow and Accountability in the Banks  
Understanding the Concerns of Smaller Banks  
The Structure of Larger Banks  
Approaching Large Banks to Sell Insurance  
The Transaction Nature of Large Banks  
The Extra Service Needs for Banks  
Selecting a Representative for a Community Bank  
Specialist Access that Banks Will Need

### **Alternative Distribution – Property and Casualty Firms**

Overview of Life Opportunities in a Property and Casualty Firm  
Ways a P&C Firm Can Sell Life Insurance Series  
Various Ways a P&C Firm Can Sell Life Insurance – Part One  
Various Ways a P&C Firm Can Sell Life Insurance – Part Two

Why Property and Casualty Firms Should Cross-Sell  
How to Cross Sell in a P&C Firm  
Future Disruption in Property and Casualty Markets

## **Development Process**

### **Development Process – General**

Retention of Successful Financial Professionals  
Teaching Your Associates How to Market- Not Just Sell  
How to Have a Coaching Conversation  
What Your Associates Want in Training  
3 Levels of Training Interaction Series – 5 sessions  
    The COP Phase  
        Show Me – COP – Activity New FP  
        Show Me – COP – Activity 2<sup>nd</sup> Year Experienced FP  
    The Coach & Consultant Phase  
        Show Me - The Consultant  
        Show Me - The Coaching Conversation  
    Continuous Improvement – 2 Sessions  
        Continuous Improvement – Kaizen – Part 1  
        Continuous Improvement – Kaizen – Part 2

### **Development Process – For Inexperienced Associates**

Mentoring of Sales Coaching-The Benefits of Pre-Sales Game  
Hiring to the Proper Mindset of Inexperienced Candidate  
Debriefing After the Sales Call  
    Show Me - Debriefing After a Sales Call  
Mentoring of Sales Coaching-The Benefits of Pre-Sales Game Planning  
    Show Me – Planning a Sales Call

### **Development Process – For Experienced Associates**

Leading Others Out of Complacency  
Why Big Producers Seek Coaching  
The Importance of Recurring Revenue to Your Associates  
Creating a Personal Development Plan Series – 2 sessions  
Planning Leading the Detached Producer Series – 2 sessions  
    Leading the Detached Producer – Part One  
    Leading the Detached Producer – Part Two

### **Development Process – For Production Growth**

Understanding the Advantages of Mentoring Series – 9 sessions  
    Overview of Mentoring  
    Benefits of Mentoring  
    The Benefits of Reverse Mentoring

How an Agency Can Support Mentoring  
The Roles & Responsibilities of the Mentor Part One  
The Roles & Responsibilities of the Mentor Part Two  
The Roles & Responsibilities of the Mentee Part One  
The Roles & Responsibilities of the Mentee Part Two  
How to Structure Study Groups  
Benefits of Joint Field Work  
Benefits of Working on Teams  
Building Effective Teams

#### **Development Process – For On-going Training**

Millennials and Baby Boomers Serving Each Other  
How a Cover Letter Helps in Underwriting  
Cross Selling Opportunities  
    Regulatory Headwinds Will Force Change  
    Getting Associates Back Selling Protection Products  
    Planning Opportunities for Annuity Holders  
    Cross Selling Protection Products - Part One  
    Cross Selling Protection Products - Part Two  
    Cross Selling Protection Products - Part Three  
Team Building Series  
    Why You Would Want to Build Selling Teams

#### **Development Process – For Building Markets**

Continuous Improvement – Kaizen – Event Based Marketing  
Deploying Associates into Markets  
Marketing Through Client Events  
How to Use Newsletters to Grow Your Associates Business  
Teaching Your Associates How to Target Market

#### **Development Process – For Staff, Functional Specialists, and Contingency Planning**

Building a Team of Specialist on a Budget  
Hiring Interns  
How Marketing Underwriters Add Value  
Holding a Specialist Accountable  
    Show Me - Keeping a Specialist Accountable

#### **Development Process – For Management Team\***

Why Sales Managers Are Not More Productive  
Helping an Associate Transition into Management  
Creating A Development Strategy for Your Leaders - Part One  
Creating A Development Strategy for Your Leaders - Part Two  
Creating A Development Strategy for Your Associates - Part One

## Creating A Development Strategy for Your Associates - Part Two

### **Accountability Process**

#### **Accountability Process – General**

- Have the Hard Conversation
- Why Accountability Can Break Down
- Terminating or Coaching Marginal Performers
- When It Is Time to Terminate Someone
- How to Terminate Someone

#### **Accountability Process – Power of Goals**

- Overview of The Importance of Goals Setting

#### **Accountability Process – Activity Monitoring**

##### **Activity Monitoring – Experienced**

- Show Me – Coach Accountability - New Experienced FP
- GAP Conversation - Promotable or Under-Performing Associate
- Why Independent Experienced Associate May Not be Hitting Their Goals?
- Show-Me - Experienced Associate Not on Plan
- What Happens When an Associates Business Plateaus – 2 sessions
  - What Happens When an Associates Business Plateaus – Part 1
  - What Happens When an Associates Business Plateaus – Part 2

##### **Activity Monitoring – Inexperienced**

- Five Key Performance Indictors to Production Growth
- Having a GAP Analysis Conversation with A New Associate
- Show-Me - GAP Analysis for New Associate

#### **Accountability Process – Self Discipline and Awareness**

- A Leader's Self Discipline
- Keys to Self-Accountability
- Self-Awareness of a Leader
- The Self-Disciplines to be a Transformational Leader

#### **Accountability Process – Staff, Functional Specialists, and Contingency Planning**

- The Value of Daily Team Briefings
- Holding a Specialist Accountable
- Show Me - Keeping a Specialist Accountable

#### **Accountability Process – The Personal Development Program**

- Creating a Personal Development Plan Series – 2 sessions
  - Creating a Personal Development Plan Series – Part 1
  - Creating a Personal Development Plan Series – Part 2

### **Accountability Process – Management Team\***

Why Managers Do Not Hold Others Accountable

Show Me – Holding a Field Leader Accountable

Show Me: Accountability Meeting When Goals are Not Hit