



## EDGE Content Library

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EDGE helps leaders **succeed at every stage of the leadership journey**. This comprehensive digital content library teaches **essential skills for building a thriving business, creating a high-performance culture,** and everything in between. Whether you want to **strengthen your own leadership skills or build your leadership team**, and whether you are new to leadership or have years of experience, EDGE has a solution for you.

# EMERGING LEADERS



## LEADER PHILOSOPHY

### CONSIDERING A CAREER IN LEADERSHIP

- Is Management the Right Role for You?
- What Do Sales Managers Do?
- The Profile of a Successful Sales Manager
- Should You Consider Going into Management?
- Should a Sales Person Give Management a Trial Run?

### EMERGING LEADERS: KEYS TO EFFECTIVE LEADERSHIP

- The Leadership Mindset
- Roles and Responsibilities of a Leader
- Enthusiasm- A Leader's Key to Attracting Others
- Overview of the Elements Of Trust
- Inadvertent Mistakes that Kill Trust
- The Power of Encouragement
- Developing Purpose in Others
- The Golden Rule is the Best Rule for Business

### TIME MANAGEMENT CONCEPTS AND TECHNIQUES

- Understanding Time Management
- Time Management Concepts and Practices
- Proven Time Management Techniques
- STOP Procrastinating!

## RECRUITING

### FINDING

#### UNDERSTANDING SOURCING FOR POTENTIAL RECRUITS

- Sources for Gathering Names of Potential Candidates – Part One
- Sources for Gathering Names of Potential Candidates – Part Two

- The Observation: Approaching Candidates in Everyday Situations
- The Personal Observation Method in Recruiting
- Strategies for Successful Recruiting and Retention Culture

#### **IDEAL CANDIDATE PROFILE AND CENTERS OF INFLUENCE**

- An Ideal Candidate Profile
- Creating an Ideal Candidate Profile
- Cultivating Nominators or Centers of Influence
- Brainstorming for Recruiting Referrals

#### **CULTIVATING POTENTIAL RECRUITS OVER TIME**

- Staying Top of Mind with Candidates
- Importance of Follow-up When You Miss a Recruit
- Why Keep a Candidate Profile

#### **DIVERSITY RECRUITING**

- Diversity & Inclusion: What that Looks Like Within an Organization
- Building Authentic Connections in Diverse Spaces
- Strategies for Increasing Recruitment by Sourcing Diversity
- The Unique Needs of Female Associates
- How to Attract Female Associates
- My Personal Journey: Attracting Women to The Industry

#### **RECRUITING FINDING - GENERAL**

- Millennials and Baby Boomers Serving Each Other
- Recruiting the Highest Quality - Part One
- Recruiting the Highest Quality - Part Two

### **SELECTION**

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#### **SELECTING TOP PERFORMERS**

- Selection of High Quality Candidates
- Traits of Top Performers – Part One
- Traits of Top Performers – Part Two

#### **HOW TO CONDUCT AN INITIAL RECRUITING INTERVIEW**

- How to Conduct an Initial Recruiting Interview - Part One
- How to Conduct an Initial Recruiting Interview - Part Two
- The Five Handshake Rule - Part One
- The Five Handshake Rule - Part Two

## **MOMENTUM BUILDING**

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### **BEST PRACTICES FOR ONBOARDING NEW ADVISORS**

- On-Boarding & Assimilating New Associates
- Virtual Onboarding
- Momentum Building for New Inexperienced Associates - Part One
- Momentum Building for New Inexperienced Associates - Part Two

### **JOINT FIELD WORK BEST PRACTICES**

- Importance of Joint Field Work – Part One
- Importance of Joint Field Work – Part Two
- Guidelines for Joint Field Work
- Missed Opportunity: Debriefing After Your Meeting

### **CREATING HIGH PERFORMANCE EXPECTATIONS**

- Creating High Performance Expectations – Part One
- Creating High Performance Expectations – Part Two
- Keys to Self-Accountability

## **DEVELOPMENT**

### **TRAINING**

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#### **WHY ADVISORS TYPICALLY FAIL**

- Not All In: Why Advisors Fail
- The Common Denominator of Failure: Slow Erosion of the Fundamentals
- Why Advisors Fail: Lack of Belief in the Product and Process Part 2
- Why Advisors Fail: Lack of Belief in Yourself
- Retention of Successful Financial Professionals

#### **HELPING YOUR ADVISORS WITH GOAL SETTING**

- Three Secrets to Effective Goal Setting
- Leading Your Associates with SMART Goals
- Two Sets of Goals – Part One
- Two Sets of Goals – Part Two

#### **CROSS-SELLING: FACTFINDING AND PROTECTION PRODUCTS**

- Good Fact-Finding for Cross-Selling
- Cross Selling Protection Products - Part One

- Cross Selling Protection Products - Part Two
- Cross Selling Protection Products - Part Three
- Cross Selling Protection Products - Part Four

## **COACHING**

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### **UNDERSTANDING MENTORING - BASIC**

- Overview of Mentoring
- Benefits of Mentoring
- Roles & Responsibilities of the Mentor - Part One
- Roles & Responsibilities of the Mentor - Part Two

### **HOW TO CONDUCT A COACHING CONVERSATION**

- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Conversation

### **COACHING BEST PRACTICES**

- Coaching How to Lead by Example
- Becoming an Effective Coach
- Activity Coaching vs. Mentoring
- Communication: Giving and Receiving Feedback
- Coaching vs. Cheerleading

## **ACCOUNTABILITY**

### **SELF-AWARENESS & SELF-DISCIPLINES OF A LEADER**

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

### **SETTING EXPECTATIONS TO DRIVE BEHAVIOR**

- Five Disciplines of Execution & High Performance
- Setting Expectations to Drive Behavior
- LAMP Main Platform: Expectations, Impact & Accountability
- Field Tested: The Importance of Expecting More from People

# DEVELOPING LEADERS



## LEADER PHILOSOPHY

### THE LEADERSHIP MINDSET AND INSIGHTS

- A Leader's Passion for Building Others - Part One
- A Leader's Passion for Building Others - Part Two
- The Leadership Mindset
- Leadership From a Legend

### DEVELOPING LEADERS: KEYS TO EFFECTIVE LEADERSHIP

- Enthusiasm- A Leader's Key to Attracting Others
- Overview of the Elements of Trust
- Inadvertent Mistakes that Kill Trust
- The Power of Encouragement
- Developing Purpose in Others
- Getting Buy-In and Consensus
- The Dangers of Sarcasm for a Leader
- Avoid Perfectionism to Lead Others

### TIME MANAGEMENT CONCEPTS AND TECHNIQUES

- Understanding Time Management
- Time Management Concepts and Techniques
- Proven Time Management Techniques
- STOP Procrastinating!

### CREATING AND DELIVERING YOUR VALUE PROPOSITION

- How to Define and Write Your Value Proposition
- Delivering Your Value Proposition

## FINDING

- Understanding Sourcing for Potential Recruits
- Sources for Gathering Names of Potential Candidates – Part One
- Sources for Gathering Names of Potential Candidates – Part Two
- The Observation: Approaching Candidates in Everyday Situations
- The Personal Observation Method in Recruiting
- Strategies for Successful Recruiting and Retention Culture

## DEVELOPING AN IDEAL CANDIDATE PROFILE

- An Ideal Candidate Profile
- Creating an Ideal Candidate Profile

## DEVELOPING YOUR MESSAGE TO ATTRACT TOP PERFORMERS

- Recruiting: Distinguish by How, Not What
- Developing Your Messaging to Attract Future Top Performers - Part One
- Developing Your Messaging to Attract Future Top Performers - Part Two
- Attracting New Candidates
- Attracting Inexperienced Candidates That Are Future Stars - Part One
- Attracting Inexperienced Candidates That Are Future Stars - Part Two
- Recruiting Role Play: The Approach

## GENERATING ADVISOR REFERRALS AND DEVELOPING CENTERS OF INFLUENCE

- Brainstorming for Recruiting Referrals
- Cultivating Nominators or Centers of Influence

## CULTIVATING POTENTIAL RECRUITS OVER TIME

- Staying Top of Mind with Candidates
- Importance of Follow-up When You Miss a Recruit
- Why Keep a Candidate Profile

## RECRUITING AND SELECTING COLLEGE GRADUATES

- Sourcing Recent College Graduates
- Recruiting and Selection of College Graduates – Part One
- Recruiting and Selection of College Graduates – Part Two
- What Attracting Millennials Can Teach Us About Everyone – Part One
- What Attracting Millennials Can Teach Us About Everyone – Part Two
- Millennials and Baby Boomers Serving Each Other

## **DIVERSITY RECRUITING**

- Diversity & Inclusion: What that Looks Like Within an Organization
- Building Authentic Connections in Diverse Spaces
- Strategies for Increasing Recruitment by Sourcing Diversity
- The Unique Needs of Female Associates
- How to Attract Female Associates
- My Personal Journey: Attracting Women to The Industry

## **COMPENSATION AND BENEFITS**

- Recruiting Candidates Without the Benefit of Benefits
- Recruiting Candidates That Do Not Need Benefits

## **SELECTION**

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### **SELECTING TOP PERFORMERS**

- Selection of High Quality Candidates
- Traits of Top Performers – Part One
- Traits of Top Performers – Part Two
- Traits to Identify in the Selection Process

### **HOW TO CONDUCT AN INITIAL RECRUITING INTERVIEW**

- How to Conduct an Initial Recruiting Interview - Part One
- How to Conduct an Initial Recruiting Interview - Part Two
- The Five Handshake Rule - Part One
- The Five Handshake Rule - Part Two
- Early Warning Signs Someone is Not a Culture Fit

### **UTILIZING REVERSE SELLING IN SELECTION**

- Hiring to the Proper Mindset of Inexperienced Candidates
- Let Them See What It Is Like
- Benefits of Reverse Selling
- Show Me - How to Reverse Sell When Recruiting
- You Will Be Overworked and Underpaid
- Show Me- You Will Be Overworked and Underpaid

### **HOW TO DETERMINE WHEN SOMEONE IS NOT A FIT**

- Early Warning Signs Someone is Not a Culture Fit
- When to Pass on a Candidate



## MOMENTUM BUILDING

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### UNDERSTANDING ONBOARDING AND MOMENTUM BUILDING FOR NEW ADVISORS

- On-Boarding & Assimilating New Associates
- How Managers Can Hurt the Pre-Contract Process – Part One
- How Managers Can Hurt the Pre-Contract Process – Part Two
- Momentum Building for New Inexperienced Associates - Part One
- Momentum Building for New Inexperienced Associates - Part Two

### UNDERSTANDING JOINT WORK BEST PRACTICES

- Importance of Joint Field Work – Part One
- Importance of Joint Field Work – Part Two
- Benefits of Joint Field Work
- Guidelines for Joint Field Work
- Planning and Debriefing from Joint Field Calls
- Show Me - Planning a Sales Call
- Show Me - Debriefing After a Sales Call

### APPROACHES TO INCREASE PRODUCTIVITY

- The Productivity Equation
- Creating an Appointment Setting Culture
- Running Productivity Campaigns to Boost Sales and Create Excitement

## DEVELOPMENT

### TRAINING

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#### WHY ADVISORS TYPICALLY FAIL

- Not All In: Why Advisors Fail
- The Common Denominator of Failure: Slow Erosion of the Fundamentals
- Why Advisors Fail: Lack of Belief in the Product and Process Part 2
- Why Advisors Fail: Lack of Belief in Yourself

#### HELPING YOUR ADVISORS WITH GOAL SETTING

- Three Secrets to Effective Goal Setting
- Leading Your Associates with SMART Goals
- Two Sets of Goals – Part One
- Two Sets of Goals – Part Two

### **THREE LEVELS OF TRAINING INTERACTION: THE COP PHASE**

- What Your Associates Want in Training
- 3 Levels of Training Interaction - The COP Phase
- Show-Me – COP Activity – New Associate Not on Plan
- Show Me – COP Talk for Accountability – 2nd Year Associate Not on Plan

### **PLANNING AND DEBRIEFING SALES APPOINTMENTS**

- Benefits of Pre-Sales Game Planning
- Show Me – Planning a Sales Call
- Debriefing After a Sales Call
- Show Me - Debriefing After a Sales Call
- Missed Opportunity: Debriefing After Your Meeting

### **TRAINING YOUR ADVISORS ON MARKETING**

- Teaching Your Associates How to Market- Not Just Sell
- Hiring to the Proper Mindset of Inexperienced Candidates
- Marketing Through Client Events
- How to Use Newsletters to Grow Your Associate's Business

### **DEVELOPMENT TRAINING - GENERAL**

- The Art of the Role Play Exercise
- Introducing a New Language to Your Sales Process and Organization
- Training & Facilitation Best Practices
- Keys to Professional Growth & Designations

## **COACHING**

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### **THREE LEVELS OF TRAINING INTERACTION - COACHING & CONSULTING PHASE**

- 3 Levels of Training Interaction - Coach & Consultant Phase
- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Meeting

### **UNDERSTANDING MENTORING - INTERMEDIATE**

- Overview of Mentoring
- Benefits of Mentoring
- Benefits of Reverse Mentoring
- How an Agency Can Support Mentoring

- Roles & Responsibilities of the Mentor - Part One
- Roles & Responsibilities of the Mentor - Part Two
- Roles & Responsibilities of the Mentee - Part One
- Roles & Responsibilities of the Mentee - Part Two

#### **HOW TO CONDUCT A COACHING CONVERSATION**

- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Conversation

#### **COACHING BEST PRACTICES**

- Coaching How to Lead by Example
- Becoming an Effective Coach
- Activity Coaching vs. Mentoring
- Communication: Giving and Receiving Feedback
- Coaching vs. Cheerleading

#### **TACTICAL STRATEGIES FOR COACHING ADVISORS**

- Coaching Advisors on What They Can Control & Influence
- Helping Advisors Focus on What Matters to their Business
- Coaching Tactics to Help Advisors Move to the Next Level
- Using the 10-10-10 Model: Helping Advisor’s Make Big Decisions
- Coaching: The Bridge Between Leadership and Entrepreneurship

## **ACCOUNTABILITY**

#### **SETTING EXPECTATIONS TO DRIVE BEHAVIOR**

- Goethe’s Creed: Expecting the Best in People
- Five Disciplines of Execution & High Performance
- Setting Expectations to Drive Behavior
- LAMP Main Platform: Expectations, Impact & Accountability
- Field Tested: The Importance of Expecting More from People
- The Expectations Matrix

#### **ACCOUNTABILITY AND DIFFICULT CONVERSATIONS**

- Accountability: Ownership vs. Consequences
- Why Accountability Can Break Down

- How to Have the Hard Conversation
- Conducting Virtual Accountability Meetings
- Leveraging Your Company Values as an Accountability Tool

#### **PERFORMANCE INDICATORS AND THE GAP ANALYSIS CONVERSATION**

- 5 Key Performance Indicators to Production Growth
- Having a GAP Analysis Conversation with New or Under Performing Associates
- Show Me - GAP Analysis with New Associates

# GROWING LEADERS



## LEADER PHILOSOPHY

### DEVELOPING YOUR ORGANIZATION'S CULTURE

- Creating a Collaborative Culture
- Building a Great Company Culture
- Lead From the Front - Get Out of the Ivory Tower
- Getting Buy-In and Consensus
- Transitioning from Micro-Managing to Leadership
- Investing In Your Business

### GROWING YOUR TEAM OF LEADERS

- Growing Your Team of Leaders by Attracting Other Leaders
- The Multiplying of Leaders
- Delegation: The Key to Growth
- The Only Way to Grow: Leadership Development
- Set up for Success: Developing Sales Managers
- Developing High Performing Teams: Taking Ownership When Things Go Wrong
- Growing People

### DEVELOPING YOUR VISION, MISSION AND VALUE PROPOSITION

- Keeping Your Vision in Focus When Leading an Organization
- Creating Buy-In On Your Vision to Your Team and Organization
- Chaotic and Confusing: When Organizations Lack Vision
- Importance of a Mission Statement and Core Values
- How to Write Core Values for Your Firm
- How to Write a Mission Statement – Part One
- How to Write a Mission Statement – Part Two
- How to Define and Write Your Value Proposition
- Delivering Your Value Proposition

# RECRUITING

## GENERAL

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### DEVELOPING A RECRUITING CULTURE

- The Importance of Developing a Recruiting Culture
- Building a Referral Culture
- Planning a Referral Culture
- Creating a Recruiting Culture
- Planning Your Recruiting Year

### BEST PRACTICES FOR THE RECRUITING PROCESS

- LAMP Main Platform: Recruiting and Selection
- Positioning the Career During the Recruiting Process
- Building a Barrier-Free Recruitment Process
- REPS Recruiting System Insight
- Keys to Successful Recruiting - could use Hoop's Avatar for this one

### RECRUITING AND SELECTION INSIGHTS FROM THE GAMA HALL OF FAME

- Recruiting & Selection: A Legend's Perspective
- Developing a Recruiting & Selection Culture
- Keys to Recruiting, Selection & Retention
- Master Agency Insights: Recruiting, Selection, Productivity and Retention

### ALPS LEADERSHIP PRINCIPLES FOR SUCCESS

- ALPS Leadership Principles for Success (Part 1)
- ALPS Leadership Principles for Success (Part 2)

## FINDING

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### CREATING AN IDEAL CANDIDATE PROFILE

- Having a Profile for Inexperienced Hires
- An Ideal Candidate Profile
- Creating an Ideal Candidate Profile

### DIFFERENTIATING YOUR BRAND TO ATTRACT TOP PERFORMERS

- Recruiting: Distinguish by How, Not What
- Positioning Your Brand For Recruitment
- Developing Your Messaging to Attract Future Top Performers - Part One

- Developing Your Messaging to Attract Future Top Performers - Part Two
- Attracting New Candidates
- Attracting Inexperienced Candidates That Are Future Stars - Part One
- Attracting Inexperienced Candidates That Are Future Stars - Part Two

#### **GENERATING ADVISOR AND CENTER OF INFLUENCE REFERRALS**

- Brainstorming for Recruiting Referrals
- Cultivating Nominators or Centers of Influence

#### **THE THREE R'S OF AGENCY BUILDING**

- The Three R's of Agency Building: Recruiting
- The Three R's of Agency Building: Retention
- The Three R's of Agency Building: 'Rithmetic

#### **RECRUITING TOP PERFORMERS**

- Recruiting High End Career Changer
- Hooking High End Career Changers

#### **RECRUITING RECENT COLLEGE GRADUATES AND CAMPUS RECRUITING**

- Sourcing Recent College Graduates
- Recruiting and Selection of College Graduates – Part One
- Recruiting and Selection of College Graduates – Part Two

#### **RECRUITING MILLENNIALS AND THE NEXT GENERATION**

- Attracting the Next Generation of Sales Talent, Segment 1
- Attracting the Next Generation of Sales Talent, Segment 2
- What Attracting Millennials Can Teach Us About Everyone – Part One
- What Attracting Millennials Can Teach Us About Everyone – Part Two
- Millennials and Baby Boomers Serving Each Other

#### **DIVERSITY RECRUITING**

- Diversity & Inclusion: What that Looks Like Within an Organization
- Building Authentic Connections in Diverse Spaces
- Strategies for Increasing Recruitment by Sourcing Diversity
- The Unique Needs of Female Associates
- How to Attract Female Associates
- My Personal Journey: Attracting Women to The Industry

## **RECRUITING MILITARY VETERANS**

- Why Hire a Veteran
- Benefits of Recruiting Military Veterans
- Overview of Hiring Veterans – Part One
- Overview of Hiring Veterans – Part Two
- Having a Plan When Recruiting Military Veterans
- How to Identify and Hire Former Military Members
- The Natural Market for Veterans
- The Military Selection Process
- Questions to Ask & Not to Ask When Recruiting Military Veterans

## **RECRUITING FINDING - GENERAL**

- Tactical Strategies to Build Your Own Networking Group
- Challenges of “Filling the Room” When Organizing Events
- Recruiting Best Practices
- Strategies for Successful Recruiting and Retention Culture
- Benefits of Reverse Selling
- Encore Career Candidates
- Recruiting Candidates Without the Benefit of Benefits
- Recruiting Candidates That Do Not Need Benefits

## **SELECTION**

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### **SELECTING TOP PERFORMERS**

- Selection of High Quality Candidates
- Traits of Top Performers – Part One
- Traits of Top Performers – Part Two
- Traits to Identify in the Selection Process

### **UTILIZING REVERSE SELLING IN SELECTION**

- Hiring to the Proper Mindset of Inexperienced Candidates
- Let Them See What It Is Like
- Benefits of Reverse Selling
- Show Me - How to Reverse Sell When Recruiting
- You Will Be Overworked and Underpaid
- Show Me- You Will Be Overworked and Underpaid



## **HOW TO DETERMINE WHEN SOMEONE IS NOT A FIT**

- Early Warning Signs Someone is Not a Culture Fit
- When to Pass on a Candidate

## **THE SCIENCE OF SELECTION**

- Choosing a Selection Assessment
- The Science of Selection & Potential to Performance

## **UNDERSTANDING RECRUITING ACTIVITY**

- Putting More Candidates in to Select Better
- The Relationship Between Recruiting and New Advisor Activity

## **TIPS AND BEST PRACTICES FOR SELECTION**

- Measuring Style vs. Substance in the Recruiting Process
- Leveraging the Ideal Candidate Profile in the Selection Process
- The Importance of the Candidate Experience & Feedback
- The Needs Based Recruitment Interview
- Recruiting Role Play: Needs Based Recruitment Interview

## **HOW TO SCREEN AN EXPERIENCED CANDIDATE**

- How to Screen an Experienced Candidate - Part One
- How to Screen an Experienced Candidate - Part Two
- How to Screen an Experienced Candidate - Part Three
- Affiliating Non-Benefited or 1099 Associates

## **MOMENTUM BUILDING**

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### **UNDERSTANDING ONBOARDING AND MOMENTUM BUILDING FOR NEW ADVISORS**

- On-Boarding & Assimilating New Associates
- How Managers Can Hurt the Pre-Contract Process – Part One
- How Managers Can Hurt the Pre-Contract Process – Part Two
- Momentum Building for New Inexperienced Associates - Part One
- Momentum Building for New Inexperienced Associates - Part Two

### **ONBOARDING AND BUILDING MOMENTUM WITH EXPERIENCED NEW ADVISORS**

- On-Boarding Experienced New Associates for a Fast Start – Part One
- On-Boarding Experienced New Associates for a Fast Start – Part Two
- Momentum Building for an Experienced Hire
- Getting Experienced Producers off to a Fast Start

## TRAINING

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### CREATING DEVELOPMENT PLANS

- Creating A Development Strategy for Your Associates - Part One
- Creating A Development Strategy for Your Associates - Part Two
- Creating a Personal Development Plan – Part One
- Creating a Personal Development Plan – Part Two

### CREATING STUDY GROUPS IN YOUR ORGANIZATION

- How to Structure Study Groups
- The Value of Study Groups for Experienced Agents and Advisors
- The Structure of a Study Group - Roles and Responsibilities
- Focus Groups - Growing our Mid-Tier Associates

### BUILDING EFFECTIVE TEAMS

- Building Effective Teams – Part One
- Building Effective Teams – Part Two
- Benefits of Working on Teams

### CREATING A TEAM SELLING MODEL

- Why Team Selling?
- Key Principles of Teaming
- Five Steps to Launching a Team
- Teaming: Structure, Roles & Responsibility
- Clients & The Delegation of Client Relationships Build Great Teams
- Teaming: Compensation Models
- Teaming: The Role of the Manager
- Managing and Structuring High Performance Teams
- Managing Successful Sales Teams

### DEVELOPMENT TRAINING - GENERAL

- The Value of a Holistic Training Model
- Building Firms by Creating Capacity: Competency-Based Training
- Recruiting is Hard, but Retention is Harder: Listen to Your People
- Know Your People: Find Out Who They Really Are
- Know Your People: Using Soft Skills in Leadership

- Helping Advisors Focus on What Matters to their Business
- Using the 10-10-10 Model: Helping Advisor's Make Big Decisions
- Retention & Productivity: A Legend's Perspective
- How to Use Newsletters to Grow Your Associate's Business

## **COACHING**

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### **THREE LEVELS OF TRAINING INTERACTION: COACH AND CONSULTANT PHASE**

- 3 Levels of Training Interaction - Coach & Consultant Phase
- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Meeting

### **COACHING TIPS AND BEST PRACTICES**

- Coaching Tactics to Help Advisors Move to the Next Level
- Coaching Advisors on What They Can Control & Influence
- Coaching: The Bridge Between Leadership and Entrepreneurship

## **COLLABORATION**

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### **UNDERSTANDING ORGANIZATIONAL DIVERSITY AND INCLUSION**

- How an Inclusive Culture Can Affect Sales
- Diversity & Inclusion: What that Looks Like Within an Organization
- Building Authentic Connections in Diverse Spaces
- Trust & Rapport: Engaging in Diverse Spaces for Advisors and Companies
- Committing to Becoming an Ally in Demographics Different from Yours
- Three Steps to Assess Inclusivity in Your Organization
- Education is Key to Inclusiveness

### **BEST PRACTICES FOR RECRUITING WOMEN**

- My Personal Journey: Attracting Women to The Industry
- Finding Women Candidates Outside Your Natural Market
- Event Best Practices Targeting Women Advisors
- Walking the Walk: The Women's Initiative Program

### **UNDERSTANDING IMPLICIT BIAS**

- What is Implicit Bias
- How Implicit Bias Affects Your Practice
- Detect, Reflect, Reject: Identifying Bias
- Identifying and Acknowledging Your Implicit Bias

## **EDUCATING YOURSELF ON DIVERSITY AND INCLUSION**

- Taking Responsibility Educating Yourself about D&I
- It Starts with You: Be Your Authentic Self
- Becoming an Impactful & Active Bystander
- Changing from the Inside Out: Being Vulnerable

## **PRACTICAL TIPS FOR DIVERSITY & INCLUSION**

- The Dangers of “Culture Fit”
- Learning from One Another: Responding to Criticism
- Understanding Microaggressions
- Finding Advocates in the Workplace
- Navigating the Double Standard & Moving Forward
- How to Thrive Without ‘Putting on Your Armor’
- Changing Your View on “Being Emotional”

# **ACCOUNTABILITY**

## **DRIVING BEHAVIOR THROUGH EXPECTATIONS AND ACCOUNTABILITY**

- Goethe’s Creed: Expecting the Best in People
- Five Disciplines of Execution & High Performance
- Setting Expectations to Drive Behavior
- LAMP Main Platform: Expectations, Impact & Accountability
- Field Tested: The Importance of Expecting More from People
- The Expectations Matrix

## **ACCOUNTABILITY AND DIFFICULT CONVERSATIONS**

- Accountability: Ownership vs. Consequences
- Why Accountability Can Break Down
- How to Have the Hard Conversation
- Conducting Virtual Accountability Meetings
- Leveraging Your Company Values as an Accountability Tool

## **PERFORMANCE INDICATORS AND THE GAP ANALYSIS CONVERSATION**

- 5 Key Performance Indicators to Production Growth
- Having a GAP Analysis Conversation with New or Under Performing Associates
- Show Me - GAP Analysis with New Associates

## **CREATING A CULTURE OF HIGH EXPECTATIONS & ACCOUNTABILITY**

- Keys to Building a High-Expectation Culture
- Creating a Culture of Expectations
- Developing a Culture of Accountability & High Expectations
- Creating a High Performance Culture

## **BEST PRACTICES ON TERMINATING UNDERPERFORMERS**

- Terminating or Coaching Marginal Performers - Part One
- Terminating or Coaching Marginal Performers - Part Two
- When It Is Time to Terminate Someone
- How to Terminate Someone

# EXCELLING LEADERS



## LEADER PHILOSOPHY

### KEYS TO BUILDING AN AGENCY

- Turnkey Approach to Agency Building
- Planning a Legacy of Success
- Keys to Good Delegation - Part One
- Keys to Good Delegation - Part Two
- The WOW Factor - Part One
- The WOW Factor - Part Two

### HARRY HOOPIS' SIMPLE RULES OF LIFE

- Hoopis' Simple Rules of Life: Part 1
- Hoopis' Simple Rules of Life: Part 2
- Hoopis' Simple Rules of Life: Part 3

### KEYS TO EFFECTIVE CHANGE MANAGEMENT

- Implementing Change
- Leading Your Organization Through Change Management
- Internal Transparency During Change Management
- The Importance of Communicating Change to Clients
- Face the Fear: Always Leave Room For Change

### LEVERAGING RESOURCES TO BUILD YOUR ORGANIZATION

- Utilizing Company Specialists to Build Your Firm
- Utilizing Local Resources to Build Your Firm
- Utilizing Company Resources to Build Your Firm

### DEVELOPING YOUR LEADERS

- Creating a Leadership Track
- The Importance of Creating Clear and Consistent Expectations Among Your Leaders

- Developing High Performing Teams: Inspecting What You Expect
- Taking the Next Step: Transitioning Your Sales Managers to General Agents
- Connecting through Leadership
- Leadership Development: A Legend's Perspective

#### **BUILDING FIRMS BY CREATING CAPACITY**

- Building Firms by Creating Capacity
- Building Firms by Creating Capacity: Planning & Market Identification
- Building Firms by Creating Capacity: The Ideal Candidate Profile for the Market
- Building Firms by Creating Capacity : Activity Management & Protégé Development

#### **LEADERSHIP INSIGHTS FROM GAMA HALL OF FAME MEMBERS**

- The Stanford Pyramid: Creators, Orchestrators and Executors
- Leadership Insights from the Hall of Fame
- Lessons from a GAMA Hall of Fame Member
- Building a Hall of Fame Organization
- Developing a High-Performance Culture

#### **LEADERSHIP INSIGHTS FROM RON ROSBRUCH - GAMA HALL OF FAME**

- Four Questions Leaders Should Ask Themselves
- The Two B's + Four C's of Leadership
- Six Critical but Often Forgotten Aspects of Leadership

#### **THREE HERO HABITS: THE GUIDE TO THRIVING IN BUSINESS AND LIFE**

- Three Hero Habits: The Guide to Thriving in Corporate America and Life
- Three Hero Habits for Great Leaders: Designing a Winnable Game
- Three Hero Habits for Great Leaders: Assuming Positive Intent
- Three Hero Habits for Great Leaders: Choosing Happiness

## **RECRUITING**

### **GENERAL**

#### **IDENTIFYING AND DEVELOPING A RECRUITER**

- Skills & Traits for a High Quality Recruiter
- Building a Close Rapport with Your Recruiter on Day 1
- The Importance of Weekly Check-In's with Your Recruiter

## **EXCELLING RECRUITING - GENERAL**

- Conducting a Recruiting GAP Analysis
- Positioning Your Brand For Recruitment
- Recruiting with D&I in Mind Shouldn't Change your Process
- How Inclusiveness Affects Recruiting

## **FINDING**

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### **DEVELOPING YOUR VALUE PROPOSITION FOR EXPERIENCED INDEPENDENT ADVISORS**

- Overview of Experienced Independent Producers
- Developing Your Value Proposition Targeting New Independent Hires
- Creating Your Value Proposition for Recruiting Independent Professionals

### **ATTRACTING EXPERIENCED INDEPENDENT ADVISORS**

- Independent Professionals - Are They a Fit for Your Firm?
- What the Independent Producer Seeks
- Reasons Independents May Affiliate with Your Firm - Part One
- Reasons Independents May Affiliate with Your Firm - Part Two

### **SOURCING INDEPENDENT EXPERIENCED ADVISORS**

- Profile for Independent or Experienced Candidates
- "Template for Recruiting Experienced & Independent Life Producers - Part One"
- "Template for Recruiting Experienced & Independent Life Producers - Part Two"
- Sources to Recruit Independent Producers

### **STRATEGIES FOR RECRUITING INDEPENDENT EXPERIENCED ADVISORS**

- The First Impression - Recruiting or Wholesaling Experienced Associates
- Using Brokerage as a Recruiting Tool
- The Self-Disclosure - Making a Great First Impression
- Show Me - Recruiting Experienced Independent Associates
- Understanding How to Attract Future Top Performers
- The Long Sell-Cycle of Recruiting Independents

## **SELECTION**

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### **IDENTIFYING LEADERSHIP POTENTIAL**

- Designing Your Leadership Training Program - Assessing Potential Leaders



- When Someone is Ready to Join Your Leadership Team - Part One
- When Someone is Ready to Join Your Leadership Team - Part Two
- Signs Someone Cannot Lead

## **MOMENTUM BUILDING**

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### **UNDERSTANDING MOMENTUM BUILDING FOR TOP PERFORMERS**

- Should You Promote a Top Sales Performer into Management
- The Third Level of Management
- A Progressive Management Development Program - Part One
- A Progressive Management Development Program - Part Two

## **DEVELOPMENT**

### **TRAINING**

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#### **BEST PRACTICES FOR CONTINUOUS IMPROVEMENT**

- Continuous Improvement – Kaizen – Part One
- Continuous Improvement – Kaizen – Part Two

#### **CREATING STUDY GROUPS IN YOUR ORGANIZATION**

- How to Structure Study Groups
- The Value of Study Groups for Experienced Agents and Advisors
- The Structure of a Study Group - Roles and Responsibilities
- Focus Groups - Growing our Mid-Tier Associates

#### **BEST PRACTICES FOR DESIGNING SALES CONTESTS**

- Designing Effective Sales Contests – Part One
- Designing Effective Sales Contests – Part Two

#### **KEYS TO HIRING GREAT STAFF**

- How to Hire Great Staff – Part One
- How to Hire Great Staff – Part Two
- How to Write a Job Description
- What Not to Ask During an Interview
- Funding an Administrative Assistant
- How to Terminate an Employee – Part One
- How to Terminate an Employee – Part Two

## **DEVELOPING A SPECIALIST PROGRAM**

- Building a Team of Specialists on a Budget
- How Marketing Underwriters Add Value – Part One
- How Marketing Underwriters Add Value – Part Two
- Holding a Specialist Accountable
- Show Me - Keeping a Specialist Accountable

## **BEST PRACTICES FOR LEADING OTHERS**

- What Do You Do When an Associate Wants to Go Independent - Part One
- What Do You Do When an Associate Wants to Go Independent - Part Two
- Leading Others Out of Complacency
- Leading the Detached Producer – Part One
- Leading the Detached Producer – Part Two

## **CREATING A DEVELOPMENT STRATEGY**

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

## **UNDERWRITING BEST PRACTICES FOR AN ORGANIZATION**

- How a Cover Letter Helps in Underwriting
- The Basics of Reinsurance
- Underwriting Best Practices

## **DEVELOPMENT TRAINING: GENERAL**

- Hiring Interns
- The Importance of Recurring Revenue to Your Associates
- Retaining Good People with Formal Mentorship Programs
- Deploying Associates into Markets
- Event Based Training
- Why You Want to Build Selling Teams
- Different Team Structures
- Regulatory Headwinds Will Force Change
- Getting Associates Back Selling Protection Products
- Planning Opportunities for Annuity Holders

## COACHING

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### COACHING BEST PRACTICES

- Why Big Producers Seek Coaching
- How to Have a Coaching Conversation
- Show Me - How to Have a Coaching Conversation

## COLLABORATION

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### UNDERSTANDING ORGANIZATIONAL DIVERSITY AND INCLUSION

- How an Inclusive Culture Can Affect Sales
- Diversity & Inclusion: What that Looks Like Within an Organization
- Building Authentic Connections in Diverse Spaces
- Trust & Rapport: Engaging in Diverse Spaces for Advisors and Companies
- Committing to Becoming an Ally in Demographics Different from Yours
- Three Steps to Assess Inclusivity in Your Organization
- Education is Key to Inclusiveness

### ENGAGING IN ASIAN, LATINO AND LBGT+ COMMUNITIES

- Being Mindful of Cultural Nuances When Engaging in Diverse Markets
- The Uniqueness When Engaging in the Asian Community
- The Uniqueness When Engaging in the Latino Community
- The Uniqueness When Engaging in the LBGT+ Community

## MOMENTUM BUILDING

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### DEVELOPING AN ACTIVITY COACHING SYSTEM FOR THE 1ST 90 DAYS

- An Overview of the Performance 90 System
- The Role of the Performance 90 Coach
- The Objective of Performance 90 System

## ACCOUNTABILITY

### HOLDING EXPERIENCED ADVISORS ACCOUNTABLE

- Why Independent Associates May Not Be Hitting Their Goals
- Show Me – Coaching Accountability - Experienced Associate Not on Plan
- What Happens When an Associate’s Business Plateaus – Part One
- What Happens When an Associate’s Business Plateaus – Part Two

## **HOLDING STAFF MEMBERS AND SPECIALISTS ACCOUNTABLE**

- Holding Staff Members Accountable
- GAP Conversation with Promotable or Under-Performing Associate or Staff Member
- Holding a Specialist Accountable
- Show Me - Keeping a Specialist Accountable
- The Value of Daily Team Briefings

## **HOLDING YOUR LEADERS ACCOUNTABLE**

- Why Managers Do Not Hold Others Accountable
- Holding a Field Leader Accountable
- Show Me - Keeping a Sales Leader Accountable
- Accountability Meeting When Goals Are Not Met
- Show Me - Accountability Meeting When Goals are Not Met