

PROFESSIONAL PATTERNS OF MANAGEMENT

Field management is key to success. Field sales management development is KBI's signature strength. By any measure, KBI has been very successful in training hundreds of thousands of managers worldwide.

Through the many years of research conducted by KBI with our extensive customer base, as well as company-specific and industry-wide trend analysis, it is apparent that financial services companies desire a proven, comprehensive, cost-effective method to train field managers.

Professional Patterns of Management offers these primary benefits:

- ◆ A single, trusted training partnership for sales management training
- ◆ Transferable, proven content
- ◆ Module format – easy to implement, train and follow up
- ◆ Proven tools for measuring effectiveness
- ◆ Reduced implementation time to capture a quick return on investment

KBI's **Professional Patterns of Management** has been incorporated into many companies located in China, Taiwan, Hong Kong, Singapore, Japan, Korea, India, Indonesia, Canada, United States, Mexico, Argentina and others.

The **Professional Patterns of Management** program is accredited with the prestigious American College's Chartered Leadership Fellow (CLF) designation. Completion of **Professional Patterns of Management** fulfills Step 1 of the American College's CLF program.

KBI can:

- ◆ Develop customized evaluation critique for selection of field managers
- ◆ Participate in the interviewing process of field managers
- ◆ Provide proven **Professional Patterns of Management**
- ◆ Install **Professional Patterns of Management** program on site

More Info

- ◆ **What You Learn** (See pages 2-8)
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WHAT YOU LEARN

Module 1: Planning Desired Results

This module develops your skill in planning the desired results. In the process, it provides you information relative to your management position -- its responsibilities and expectations.

Module 2: Communicating Effectively

This module will help you think through and communicate your plans and philosophies, as well as, teach you to broadcast good news.

Module 3: Recruiting Winners

This module acquaints you with a proven process for selecting, evaluating, and attracting an adequate number of high potential producers each year.

Module 4: Building Confidence Through Competence

This module assists you in building a program of education for your associates.

Module 5: Developing Independent, Responsible Producers

In this module, you learn to distinguish between educating and training producers. You'll become knowledgeable about proven development programs and procedures.

Module 6: Creating Prospect Attraction And Trust

In this module, you'll learn proven ways to create prospect attraction and trust. You will utilize your experience to help your producers market their own identity.

Module 7: Setting Agents Up For Early Success

In this module, you'll build your confidence in setting producers up for early success. Checklists and procedures will be examined.

Module 8: Monitoring Consistently What Matters

In this module, you'll become acquainted with the triangular approach for managing production. You'll discover the positive impact monitoring and measuring has on producer productivity and development.

Module 9: Multiplying To Maximize

This module shows you how to select and develop key office personnel. Carefully selected and trained multipliers position you to be a leader.

Module 10: Enhancing Leadership Skills

In this module, you'll examine the ways in which the Agency Builder motivates and leads.

Module One – Planning Desired Results

Essence of Module - This module develops your skill in planning the desired results. In the process, it provides you information relative to your management position -- its responsibilities and expectations.

Module Objective - This module challenges you to maximize your personal development through a positive learning experience. It will discipline you to plan your organization's growth. Additionally, it will help you identify the four key areas that need your time and attention.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ The Chief Aim ◆ The MBO Process ◆ Five-Year Model ◆ 59 Dimensions ◆ Management Accountability ◆ The Best Kept Secret ◆ "Main Event" Management 	<ul style="list-style-type: none"> ◆ Ten Characteristics of Leadership ◆ Your Mission Statement ◆ Charting Your Course ◆ Forecasting the Growth ◆ 59 Dimensions Agency Profile ◆ Leadership Behavior ◆ Looking at the Major Systems ◆ Self-Analysis Questionnaire 	<ul style="list-style-type: none"> ◆ Success Model ◆ Sample Mission Statement ◆ MBO Process ◆ Total Sales Force ◆ Organizational Chart/Traditional ◆ Life Agency ◆ Five-Year Model ◆ Procedures On Paper ◆ 59 Dimension Agency Profile ◆ A Dozen and One Disciplines

Module Two - Communicating Effectively

Essence of Module - This module will help you think through and communicate your plans and philosophies, as well as, teach you to broadcast good news.

Module Objective - This module will help you identify opportunities for effective communication. You will develop communication tools that will inform, instruct and inspire.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ Communication Philosophy ◆ The Starting Point ◆ Impact Words ◆ Flash Bulletins ◆ Monday Morning Memo ◆ 1st Day PCA Monthly Report ◆ The Difference Maker 	<ul style="list-style-type: none"> ◆ Monday Morning Memo ◆ Build an Effective Communication System ◆ Impact of Recognition 	<ul style="list-style-type: none"> ◆ The Starting Point ◆ Make Bulletins Sparkle ◆ Monthly PCA Report ◆ "Power of Tax Deferral" Illustration ◆ The Might of Little Things

Module Three - Recruiting Winners

Essence of Module - This module acquaints you with a proven process for selecting, evaluating, and attracting an adequate number of high potential producers each year. You will learn the importance of the six vitals.

Module Objective - This module will cause you to recognize the direct relationship between recruiting and production. It will build your confidence in the probing interview and your persuasiveness in the presentation step.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ The Number One Job ◆ Searching Sources ◆ Evaluating for Winners ◆ The Six Vitals ◆ Building the Reservoir ◆ Look for "The Keepers" ◆ Six Key Questions ◆ Attracting the Talent ◆ "Key Producer" ◆ Recruiting Experienced Producers 	<ul style="list-style-type: none"> ◆ Develop an Atmosphere of Success ◆ Who Succeeds Around Here? ◆ Develop Recruiting Success Formula ◆ Recruiting Rules ◆ Build Your Reservoir ◆ Identify Key Producers ◆ Your "Sunday Punch" 	<ul style="list-style-type: none"> ◆ 20 Factors Affecting Retention ◆ Ideal Profile ◆ Total Sales Force ◆ Pre-Approach Letters to Prospective Producers ◆ Vocational Quiz ◆ Attributes for Success ◆ An Interest-Arousing Strategy ◆ Reservoir Card ◆ Evaluation Highlights ◆ Knockout Factors ◆ Success Predictability Profile ◆ Final Evaluation Checklist ◆ Experienced Producer Issues ◆ Evaluation Production History ◆ Assets Under Management ◆ "Sunday Punch" Outline

Module Four - Developing Independent, Responsible Producers

Essence of Module - In this module, you learn to distinguish between educating and training producers. You'll become knowledgeable about proven development programs and procedures.

Module Objective - You'll improve your effectiveness in building attitudes, teaching sales strategies and managing activity.

Key Information	Test Your Knowledge	For Your Review
<ul style="list-style-type: none"> ◆The Training Goal ◆Train the Planning Function ◆Attitude Building ◆Goal Attainment Insurance ◆Develop Sales Process ◆Plan the Field Work ◆Fostering Self-Development 	<ul style="list-style-type: none"> ◆Coaching Confidence ◆The Priority in Training ◆Client-Building Process ◆Your "Commercial" ◆What Do You Do? ◆The Initial Interview ◆Closing With Confidence ◆The Follow-Through Sale 	<ul style="list-style-type: none"> ◆Planning The Ideal Day (Sample) ◆Box-Time Theory ◆Goal Attainment Insurance ◆How A Young Agent Started ◆Self-Concept ◆The Sales Trac ◆Thoughts To Remember ◆Let 'em See It Done

Module Five - Developing Independent, Responsible Producers

Essence of Module - In this module, you learn to distinguish between educating and training producers. You'll become knowledgeable about proven development programs and procedures.

Module Objective - You'll improve your effectiveness in building attitudes, teaching sales strategies and managing activity.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆The Training Goal ◆Train the Planning Function ◆Attitude Building ◆Goal Attainment Insurance ◆Develop Sales Process ◆Plan the Field Work ◆Fostering Self-Development 	<ul style="list-style-type: none"> ◆Coaching Confidence ◆The Priority in Training ◆Client-Building Process ◆Your "Commercial" ◆What Do You Do? ◆The Initial Interview ◆Closing With Confidence ◆The Follow-Through Sale 	<ul style="list-style-type: none"> ◆Planning The Ideal Day (Sample) ◆Box-Time Theory ◆Goal Attainment Insurance ◆How A Young Agent Started ◆Self-Concept ◆The Sales Trac ◆Thoughts To Remember ◆Let 'em See It Done

Module Six - Creating Prospect Attraction and Trust

Essence of Module - In this module, you'll learn proven ways to create prospect attraction and trust. You will utilize your experience to help your producers market their own identity.

Module Objective - The aim here is to educate you in the many ways you can cause your producers to become known for what they know.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ The Most Significant Factor ◆ Your Competitive Edge - Marketing ◆ Marketing Defined ◆ External Marketing vs. Internal Marketing ◆ "Capturing Mind Share" ◆ Proven Marketing Strategies ◆ Analyze Where They've Been 	<ul style="list-style-type: none"> ◆ Marketing In Your Organization ◆ Analyze Where They've Been ◆ Market Evaluation ◆ Construct the Plan ◆ Best Prospects ◆ Examine Improvement Possibilities 	<ul style="list-style-type: none"> ◆ Low-Budget Marketing Strategies ◆ Marketing Changes

Module Seven - Setting Agents Up For Early Success

Essence of Module - In this module, you'll build your confidence in setting producers up for early success. Checklists and procedures will be examined.

Module Objective - This module will help you to master the art of moving producers to an early, confident start in their new role.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ Commitment "Place Mat" ◆ Development Grid ◆ Joint Field Selling ◆ Memorandum of Understanding ◆ Benchmark Checklists ◆ Producer's Mission Statement 	<ul style="list-style-type: none"> ◆ Induction Initiatives ◆ Develop Your "Place Mat" Interview ◆ Develop Your Induction Checklists 	<ul style="list-style-type: none"> ◆ Commitment "Place Mat" Interview ◆ Operation Fast Start ◆ New Producer Development Grid ◆ Model Joint Work Schedule ◆ Memorandum of Understanding ◆ 30-Day Checklist ◆ The Critical 90-Day Checklist

Module Eight - Monitoring Consistently What Matters

Essence of Module - In this module, you'll become acquainted with the triangular approach for managing production. You'll discover the positive impact monitoring and measuring has on producer productivity and development.

Module Objective - This module will help you learn more and better ways of monitoring producer productivity.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ Production Triangle ◆ Growing Winners ◆ Four Critical Areas ◆ “PEP” Sessions ◆ Stay Brilliant on the Basics ◆ Achieving Vertical Growth ◆ Fix the Management Focus Monthly ◆ Performance to Potential 	<ul style="list-style-type: none"> ◆ Helpful Monitoring Activities ◆ Helping People Grow ◆ How Well Do You Manage Your Time? ◆ Expectations of Management ◆ Monitoring In Your Agency 	<ul style="list-style-type: none"> ◆ What Agents Expect ◆ Weekly Progress Guide ◆ Performance Improvement Formula ◆ “PEP” Session Questionnaire ◆ “PEP” Pointers ◆ Monthly Focus Report

Module Nine - Multiplying to Maximize

Essence Of Module - This module shows you how to select and develop key office personnel. Carefully selected and trained multipliers position you to be a leader.

Module Objective - You'll develop your process for attracting and developing others. This leverages your ability and time to focus on the high pay-off activities.

Key Information	Test Your Knowledge (Assignments)	For Your Review (Exhibits)
<ul style="list-style-type: none"> ◆ Bringing Out The Best In Others ◆ Improving Skill Levels ◆ Identifying Organization Leaders ◆ Five Ongoing Evaluations ◆ Key Office Person (KOP) Contribution ◆ Marketing Team Leader Impact ◆ Leadership Core Competencies 	<ul style="list-style-type: none"> ◆ KOP Evaluation ◆ Developing Marketing Team Leaders ◆ Improving Skill Levels ◆ How Do You Multiply? 	<ul style="list-style-type: none"> ◆ Organizational Chart/Traditional Life Agency ◆ The Advantages of Joint Selling ◆ Insurance Policy for FSM Success ◆ Organizational Chart/"Rainmaker" ◆ Multipliers Are Selected To Be Winners

Module Ten - Enhancing Leadership Skills

Essence of Module - In this module, you'll examine the ways in which the Agency Builder motivates and leads.

Module Objective - In this module, you'll learn how to develop the eight motivational dimensions. You'll improve your effectiveness as a relationship builder and a manager of management time.

Key Information	Test Your Knowledge	For Your Review
<ul style="list-style-type: none"> ◆ The Hierarchy of Needs ◆ Motivating at Higher Levels ◆ Timing vs. Scheduling ◆ Effectiveness vs. Efficiency ◆ Developing Time Sense ◆ Relationship Building ◆ Elements of Your Motivating System ◆ Boss vs. Motivator ◆ Proven Motivators 	<ul style="list-style-type: none"> ◆ Messages To Remember ◆ Know Where Your Time Goes ◆ Developing A Dynamic Sales Organization ◆ Grading Your Skills ◆ Boss vs. Motivator 	<ul style="list-style-type: none"> ◆ Important Management Words ◆ The Might of Little Things ◆ Leadership Makes The Difference ◆ This Year's Forecast

PPM Course Support Materials

Tuition includes the following:

**Professional
Patterns of
Management**



This 500+ page binder contain all ten modules for your study. Each module is divided into an overview and objective, key information, testing your knowledge and a review. It incorporates the follow materials.

**Leading
Edge
Managing**



This 8-CD audio series includes a wealth of information on topics such as recruiting, training and developing new agents. These proven management concepts will benefit any manager looking to develop a dynamic sales organization in the 21st century.

**Building the
Master
Agency**



The Kinders, along with Val Ivanov, share their time-tested systems-oriented approach to agency building. Learn how to build a world-class organization from the masters of the industry. This 325-page hardbound book outlines the systems for building a master agency.

PPM Certification Process

1 Order course from KBI

To order material, contact us at 972-380-0747 or 800-372-7110.

2 Study course material utilizing binder, books and audio CDs

You will need to go through entire material as a self-study course. We estimate it will take five to six months to complete the material.

3 Complete assignments in modules

Each module contains different action and reading or listening assignments

4 Submit assignments to KBI

Mail your completed assignments to KBI's Home Office. All assignments must be completed in full before we will begin the certification process. You may also want to submit a copy of assignments to your regional manager.

5 Assignments will be evaluated and certified

KBI's Certification Officer will evaluate and assess your assignments. This process will take from one to two weeks.

6 Receive completion certificate – Professional Agency Builder Degree

You will be mailed a copy of your assignments with notes from KBI's Certification Officer. Based on successfully completing the assignments, you will receive a certificate of completion for the course.

7 The American College

Once you have received your PPM Certification, KBI will submit your course completion to The American College. You will have fulfilled Step 1 in obtaining the Chartered Leadership Fellow (CLF) Degree.

BONUS: Chartered Leadership Fellow



What is the CLF?

The CLF is the first managerial leadership designation created specifically for financial services professionals. It uses practical, hands-on applications to teach recruiting and selection, marketing, leadership, team building and interpersonal organization skills, and management. 250+ students have earned the CLF since its first class in 1999.

KBI's **Professional Patterns of Management - 21st Century** is one of the courses available for completing the CLF designation.

For more detailed information explaining the CLF program, log on to <http://theamericancollege.edu>



Self-Study

This is designed for the student to purchase individually. Progress is monitored by KBI. Each student will have a moderator at KBI who will guide their progress. (Tuition - \$1079)

Contact PPM Specialist or order Professional Patterns of Management from our Store

Tuition

Course Fee	\$950
Required Material	\$129
Total	\$1079

Course Fee - \$950

Course Fee includes course binder, certification process, certificate (based on completion), and all shipping & handling from KBI offices.

Required Material - \$129

Required Material includes:

Leading Edge Managing audio CDs \$89

Building the Master Agency book \$40

Should you already have these materials in your library, you may use them instead of purchasing the Required Material.

Payment Method

Check or Credit Card (VISA, Mastercard, American Express)

Study Group

A KBI Instructor provides classroom instruction for your company's group. The classroom instruction is typically separated into 4 one-day sessions during a 12 month period.

Tuition - \$1079/student and KBI Instructor's fee and travel expense.

[Contact PPM Specialist](#)

For Your Company

We also can provide a customized course for your company. Please [contact our PPM Specialist](#) for more information.

For Fraternal

Please [contact our PPM Specialist](#) for more information on our **Professional Patterns of Management** for Fraternal Companies.

Order PPM Course - Contact PPM Specialist

Contact us for more information

To schedule a Study Group, ask questions or purchase the Self-study **Professional Patterns of Management**, contact **Bill Moore** at:

Phone (800) 372-7110 or (972) 380-0747

Email WMoore@KBGroup.com

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Dallas, TX 75248



Bill Moore, Vice President and Sr. KBI Consultant, has 25 years experience in the Financial Services Industry and an immense knowledge of Sales & Marketing, Management Development, and Agency Building. Bill began his insurance career in 1977 as an agent with Mutual of New York. Moving into management, he integrated the Kinders' systems and concepts as an Agency Builder for MONY. In 1982, he took this education and experience to the home office when he became Field Director of Development for both the sales force and the sales management at MONY.

Based on his practice and understanding of the industry, Bill is a natural at providing companies the assistance needed to build strong management talent. His work includes all segments of the Financial Services business: Producers, Agency Heads and Home Office Executives. Bill's principal focus as a KBI consultant is developing sound and fundamental management. His consulting experience includes companies in the United States, along with extensive work in the Pacific Rim.

Bill has earned his Chartered Life Underwriter (CLU) and Chartered Financial Consultant (ChFC) designations.