The Insurance Institute of Zambia (IIZA)

AGENCY MANAGEMENT COURSE



Online Course

Course Overview

The Agency Management Course is a skills-based program designed to help a field manager fully develop and sharpen specific management skills in the areas of planning and goal setting, recruiting and selection, training, and activity management. Focuses on building agency managers' skills to succeed in today's competitive business environment.

This course provides the basic and intensive field management skills to the new managers and established mangers and upon completion candidates are expected to be able to establish an agency and guide the future generation to perform well in insurance industry.

Those who complete this course will be able to demonstrate the ability to improve key agency-success metrics, including:

- Retention of full-time agents
- New premium written by new full-time agents
- Number of new agents contracted and retained
- Number of potential recruits

Suitability

This course is suitable for: -

- Agency heads or functional managers, those with specialized functions such as recruiting or training, and those who need to develop their management skills to increase performance
- Sales managers making the transition from a position with production responsibility to one with managerial responsibility
- Established agency managers looking for a refresher on essential sales-management practices and as a source of new ideas from this course.



Module 1: Preamble

- Basic Principles of Life/Takaful/Financial Services Agency Management
- The MDRT's Whole-Person Concept
- Change of Role: Agent to Agency Leader

Module 2: Introduction to Agency Management

- New Developments and Transformation of the Financial Industry
- Agency Management
- Benefits and Challenges of Being an Agency Leader
- Tasks of an Agency Leader Versus an Agent
- Required Competencies of an Agency Leader
- Support Structure for an Agency Leader

Module 3: Leadership and Planning

- Good Leadership
- Agents' Expectations
- Agency Culture
- Agency Culture and Performance
- What Influences Agency Culture
- Planning
- Goal Setting
- Action Planning
- Agency Philosophy

Module 4: Recruitment

- Definition of Recruitment
- Recruiting Philosophy
- Why Recruit?
- The Importance of Recruiting
- The Recruiting Process
- Recruiting Objectives
- Developing The Agents Profile
- Facts of Recruiting Activities and Selection Activities
- Major Source of Candidates
- Candidate Guidelines
- People Who Are Interested in This Industry
- Recruiting Through Personal Activity
- Getting Help from Nominators
- Recruiting Trends Today

Module 5: Selection

- Definition of Selection
- The Importance of Selection
- The Principles of Selection
- The Selection Process
- The Selection Process Elaborated
    - Step 1: Initial Interview and Selection Screening
    - Step 2: Fact-Finding Interview
    - Step 3: Additional Information
    - Step 4: Final Evaluation & Decision Making
    - Step 5: The Career Presentation
    - Step 6: Pre-Contract Orientation Program
    - Step 7: Early Individualized Training
- The Selection Process

Module 6: Training

- Definition of Training
- The KASH Formula
- The Principles of Adult Learning
- Barriers to Learning
- Preparing to Train
- The PESOS Training Process

Module 7: Performance Management and Supervision

- What is Performance Management?
- Definition of Supervision
- Why Performance Management and Supervision?
- Why Agents Fail
- Good Performance Management and Supervision
- Methods of Performance Management and Supervision
- Case Study – Supervision

Module 8: Performance Management

- The Need for New Agents Retention
- The Benefits of Retention
- Factors Affecting Retention
- Business Retention (Persistency)

Module 9: Motivation

- Definition of Motivation
- Sources of Motivation
- The Need to Motivate
- Maslow's Hierarchy of Needs
- Motivation Factors
- Who do New Leaders Turn to for Help?
- Case Study

Module 10: Agency Building Road Map

- The Future
- Helping New and Established Agents
- Motivating New Agents
- Problems of Established Agents
- Systems That Work
- Your Own Agency Plan

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