

## Elements of Leadership

Achieving Excellence in Frontline Management



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## Agenda

- Overview of the *Elements of Leadership* program to develop new managers
- Insight from two field leaders on how to use the program
- Review sample materials and respond to questions

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## Elements of Leadership



Ensure a successful launch for your new frontline leader

- Program includes
- Frontline leader guidebook
  - Facilitator guidebook
  - Access to additional resources and practices online

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**Frontline Leaders Bring...**

- Energy and creativity to your leadership team
- Business growth through multiplication
- Management bench strength for succession planning
- The critical link between business strategy and daily performance

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**New Frontline Leaders Need...**

- A mentor and coach (you!)
- A thorough and thoughtful development process
- Hands-on learning — to learn by doing
- Best practices to build the right habits
- Simple and regular follow up to stay on track

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**Your Challenge**

- Time
  - Having to plan, create and deliver the training
- Scale
  - Covering all the key topics in a way that's comprehensive without getting bogged down
- Process
  - Giving the new manager a solid track to run on, from basic to more complex assignments
- Flexibility
  - Taking into account the fluid nature of activities, opportunities and events in a field operation

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## The Solution: Elements of Leadership

- Skill development in five critical areas
  - Recruiting
  - Selection
  - Training and development
  - Accountability
  - Support and culture
- Research-based best practices
- Supporting tools and resources
- Flexible modular format
- Automatically tailored to your agency or firm

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## Elements of Leadership



5 Modules  
24 Topics  
75 Assignments

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## Module One: Recruiting

### 6 Sections

- Overview of the Recruiting and Selection Processes
- Learning and Using the Candidate Profile
- Introducing the Career
- Generating and Approaching Warm Source Leads
- Generating and Approaching Cold Source Leads
- Managing Your Recruiting Pipeline



20 assignments

9



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## Module Two: Selection

### 7 Sections

- Using In-Depth Interviews to Assess Fit
- Using Screening and Assessment Tools
- Conducting the Compensation and Expectations Interview
- Assessing Willingness to Prospect and Ask for Referrals
- Building Team Relationships
- Conducting the Deselection Conversation
- Managing Your Selection Pipeline



22 assignments

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## Module Three: Training and Development

### 4 Sections

- Orientation to Training
- Routine Performance Evaluation
- Initial Sales Training
- Training Through Joint Work



10 assignments

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## Module Four: Accountability

### 4 Sections

- Being a Boss
- Building the Right Habits
- Using Meetings to Inspect What You Expect
- Ensuring Support Through Accountability



12 assignments

12



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## Module Five: Support and Culture

### 3 Sections

- Building Authentic Relationships
- Ensuring Frequent and Meaningful Contact
- Soliciting Feedback for Improvement



11 assignments

13



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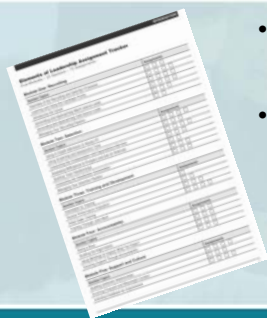
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## How the Program Works



- Each module is comprised of 3 to 7 section topics
- Each section contains a simple Concept in Brief and 1 to 4 hands-on assignments

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## The Concept in Brief



Simple and straightforward topic briefings

- What the topic is
- Why it's important
- What it looks like

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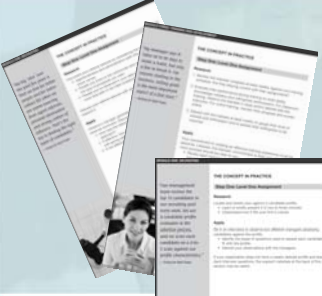
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## Level One Assignments



- Research – Learn how it works in your agency or firm
- Apply – Put your new knowledge to work

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## Level One Assignment Example

**MODULE ONE: RECRUITING**

"My big 'aha' over the past five years is that we find far better people and far better culture fits when we are 'worm-sourcing' from agent referrals, personal observation and strong centers of influence. That's the key to finding the right types of candidates."  
*— Finding the Right People*

**THE CONCEPT IN PRACTICE**

**Step One: Level One Assignment**


**Research**  
 Document your referral network by considering the people you know:

- Agents/brokers and administrative staff who may be prepared to share names
- People you know in the community who regularly interact with the type of prospects you want
- People you've observed in your daily life who you should spend more time with to do initial screening

Discuss your referral network with your manager and identify ways to expand it.

**Apply**  
 Observe a manager generating referred leads from an internal or external nominator. Discuss what you observed:

- How was the referral requested? Why does the manager use this approach?
- If effective, how was the nominator made to feel comfortable with giving referrals?
- If not effective, what might be done differently next time?

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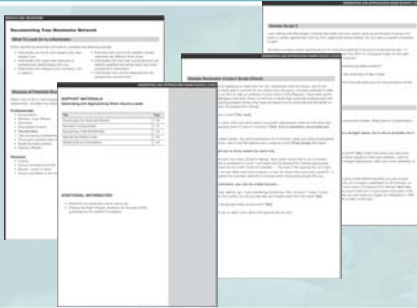
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## Support Materials



Support materials are provided throughout the guidebook

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## Reflect

DEBRIEFING AND ASSIGNMENTS WORKSHEET (LEVEL ONE)

**Step Two: Prepare for Debrief**

**Notes**

1. What are the differences between virtual coaching, virtual coaching with an additional assignment? Which do you think will be the most challenging for you? For the best challenge of day?
2. Why would the best in developing tomorrow's leadership? Why do you think that some managers procrastinate about developing their assignments?
3. Identify at least three situations you encounter weekly where you personally observe someone who either you should have an early career assignment.

DEBRIEF YOUR ASSIGNMENT WITH YOUR MANAGER AND/OR THROUGH NEXT STEPS.

Following the level one assignment

- Think about what you've learned
- Anticipate what could happen

Process builds self-awareness and deepens learning

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## Debrief and Next Steps

Facilitator

- Spends 15 minutes inspecting what is expected
- Schedules additional level one assignments
- Begins assigning levels two through four as soon as appropriate

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## Facilitator Guidebook

- Contains every assignment at every level
- Provides debrief questions for each assignment
- Makes it simple to inspect what you expect during short weekly meetings
- Keeps you prepared and the frontline leader on track

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## The Facilitation Process

- Initial meeting (30 minutes)
  - Review guidebook with frontline leader
  - Schedule regular weekly meetings
  - Make initial assignments with deadlines
- Weekly meetings (15 – 30 minutes)
  - Debrief completed assignments
  - Assess willingness and ability
  - Select next assignments and set deadlines

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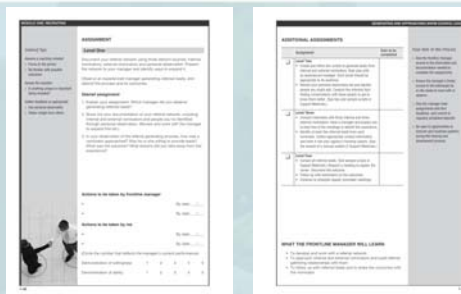
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## Weekly Meetings



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## Simple and Straightforward Frontline Leader Development

Structure + flexibility = a great fit!

- Tightly-focused content
- Research-based best practices
- Thorough and thoughtful learning process
- Built-in customization for each agency/firm
- Efficient and effective facilitator involvement

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## Remember...

*"The adventure of life is to learn. The purpose of life is to grow.  
The nature of life is to change. The challenge of life is to overcome.  
The essence of life is to care. The opportunity of life is to serve.  
The secret of life is to dare. The spice of life is to befriend.  
The beauty of life is to give."*

- William Arthur Ward

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## Elements of Leadership



Give your new  
frontline manager  
the best possible  
start in the career

Significant discounts  
available for  
GAMA Foundation  
contributors

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