

## Developing Future Leaders

**Christopher M. Panell**  
**Regional Director**

**Agency Management Development**

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## Objectives

- Present Guardian's sales management development process
  - Guiding Principles
  - Opportunities
  - Pre-appointment Selection Process
  - 5-Year Development Process
  - Q & A

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## Our Guiding Principles

- Management Development for Front Line Managers
- Program Timeline of 5 years
- Categorization of Content
- Identify Gaps & Address Needs
- Focus on Recruiting, Selection, Training & Supervision
- Establish Success Criteria

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## Opportunities

- Compensation Models
- Tracking
- Accountability
- Delivering Training to All Levels
- Recognition/Conferences
- Field Partnerships

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## Pre-Appointment Selection Process for Front Line Managers

- Move towards Universal Selection Process
- Incorporate standard company procedures
- Maximize Sales Manager Intern Programs
- Sales Manager Assessment Program
  - AIM and Crossroads
- Challenges:
  - Compensation, Tracking, Accountability

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## Management Development Year #1

- *Sales Manager School*
  - **Core content exposure**
  - **Business plan**
- Completion of "Blended Learning" Content
- Matriculating towards professional designation(s)
- Sales Manager Competencies
  - **Living Balance Sheet User/Subscriber**
  - **Candidate Identification and Attraction**
- *Essentials Leadership Development*
- Career Path Assessment

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## Management Development - Year #3

• **Core Curriculum:**

- Next Generation Study Group
- Development Plan Creation & Implementation - 90 Day Plans
- Continued Participation in "Blended Learning" Content
- Bench Program Assessment
- Professional Development - CLU, ChFC
- Sales Manager Summit
- PCA Workshop\*

**Non-Core 'Electives':**

- Conference Attendance - Leaders
- Website Support for R, S, T, Compliance, etc...
- Mastery of Financial Representatives Plan

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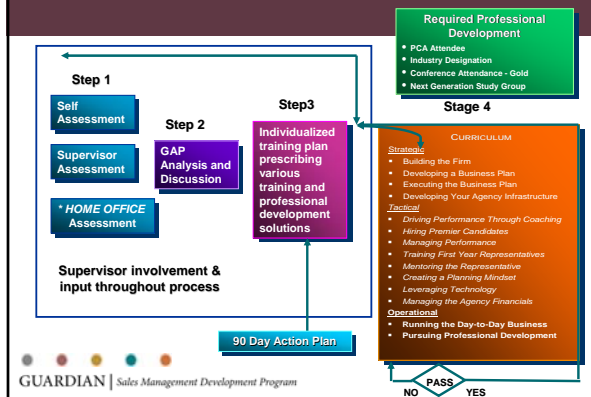
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## Leadership Development - Year #3



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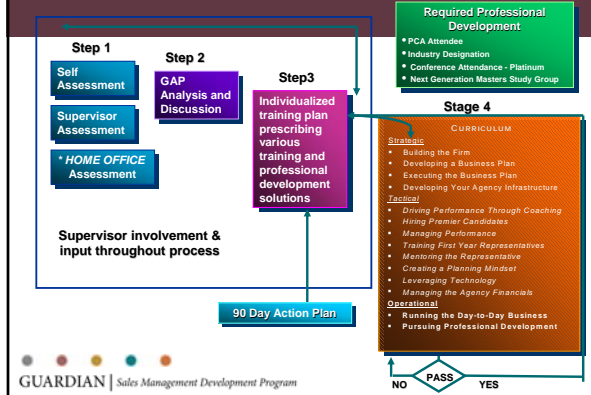
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## Leadership Development - Year #4



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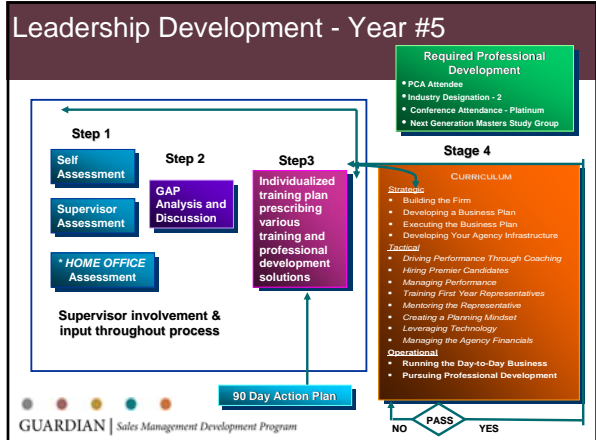
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### Q & A

**Christopher M. Panell**  
Regional Director

**Agency Management Development**

**646-465-2764**

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