

## Leadership Development – Creating the Growth Environment

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LAMP  
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## Creating a Leadership Environment

- Building bench strength requires systems, focus, and patience
- Building bench strength is our responsibility

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## Important / Urgent (Old Paradigm)

Recruiting  
Compliance  
District Production  
Personal Production  
Ongoing Training and Development

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## Important / Non-Urgent

Vision Time

Recruit Lead Prospecting

**Leadership Development**

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## Two aspects of moving Leadership Development into the Important – Urgent

- Our Behavior
- The Behavior of our Developing Leaders

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## Making Leadership Development more Urgent for us:

Build Systems for lasting change

- Run a rigorous LEAD program
- Set leadership expectations and hold your leaders accountable
- Leverage your calendar – plan leadership events
- Hire a coach and have Leadership Development as a key agenda item

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## Creating urgency for future leadership teams:

- Real accountability in the Lead Program
- Giving them ownership for specific leadership responsibilities
- Getting them involved as coaches – mentors for organization and charity
- Run Monday meetings, contests, new rep phoning

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## What makes a Championship Team?

Is it the coaching?

( OR )

Is it the players?

**BOTH**

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## LEAD Program Curriculum

- Month 1: Pierz's Pillars
- Month 2: Referred Lead Prospecting / Selection Process
- Month 3: What is a Leader? Maxwell DVD
- Month 4: How to grow as a Leader? Maxwell DVD
- Month 5: Training (Sales School) and Development
- Month 6: Relationship Styles
- Month 7: Difficult Conversations/ Coaching
- Month 8: Leadership is Influence. Maxwell DVD
- Month 9: Time Management/ Compliance
- Month 10: Financial Rep business plan – mentor
- Month 11: Contract Management/ Staffing to MD/FD role
- Month 12: Graduation Dinner/ Pierz's Pillars Review

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## Accountability in LEAD

Lead Participant Monthly Expectations:

- 15 Fact Finders  
( AND )
- 4 Financial Representative Referrals  
( OR )
- 2 First Interviews

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## LEAD Accountability

Failure to meet Expectations

First month : **Probation**

Second consecutive Month: **No stipend**

Third consecutive Month:  
**Removed from LEAD for two months**

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## How to identify Leaders

Wide Net or Highly Selective?

- Alignment with Core Values
- Quadrant I Financial Rep
  - Doing it the Network Office way and Thriving
- First 40 Qualifiers
- Staffed Up
- Joint-work supporters

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## LEAD Program

### Compensation

- \$200/mo Stipend for minimum activity
- \$400/mo Stipend for exceeding minimums
- MDRT to receive Field Director contract and responsible for sourcing one new Financial Representative.

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## Front Line Leaders

### Field Director Minimum Expectations

- 75% MDRT
- 2 Recruits
- Share of Development Targets

### Field Director Accountability

- Fail Recruits and Targets in calendar year – must be on pace by July 1<sup>st</sup> for the following years expectations.
- Fail Recruits or Targets in calendar year – must satisfy following year's expectations by December 31<sup>st</sup>.
- Terminated as Field Director

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## Spirit of Leadership Development

- Agreed upon systems and expectations create the accountability – you must live by them
- Your leaders always know where they stand – it is their choice – it is your organization

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## Compensation

### Field Directors

- 50% of New Agent Fees if responsible for the lead which led to a recruit
- 25% of New Agent Fees if not responsible for the recruit
- Same % share of AAB
- \$500 Bonus for 1<sup>st</sup> 40 and/or 2<sup>nd</sup> 60
- 50% College Agent Fees

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## Exporter of Leadership Talent

Expectations to become Managing Director:

- MDRT personal production
- Recruit a minimum of 2 FR's from their sources each year
- Unit production must exceed \$500,000 w/o FD's production
- Expansion needs of Organization align

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## Roles & Responsibilities

### Field Director (Front line Leaders)

- Mentor candidates through selection process
- Teach a topic in training
- RACE new Financial Reps
- Casework and weekly new rep development
- Own an Agency activity (Monday AM Meeting, Refresher School, Contest, Annual Meeting)

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## My Roles & Responsibilities

- Relationship with Managing Partner
- Develop Field Directors
- Manage Recruiter
- MDRT personal production
- Run a rigorous Leadership Program
- Coach experienced Financial Reps
- Casework and business planning
- Staff, Budget, Compliance

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## Role Model Successful Activities

- Charitable Service and Community Involvement
- Serving on Corporate/Non-Profit Boards, Industry Committees, and/or your company's committees
- Scheduled buffer time (Ideal calendar)
- Shared staffing systems to support the organization

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## The Future Looks Bright

- Incubator of Districts
  - Rolled out MD in 2007
  - Rollout another MD in 2009
- Span of control
  - 6 new Financial Reps per Field Director
  - 5 recruiting units (MD, 2FD, CUD, Recruiter)
  - 12 new recruits a year
- Specialized personal practice
  - High income, high net-worth , charitable giving
- Pods of Planners (Teams)

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### Where would I be without a team?

- RACE
- Predominately joint-work
- Low challenge, low support
- Maintenance recruiting
- No growth due to retention

Get practiced in having difficult conversations with your Leadership Team and scheduling Vision Time to encourage abundant thinking.

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### Important / Urgent (New Paradigm)

- Leadership Development
- Compelling Vision
- Recruiting
- Compliance
- Production Results
- Ongoing Training and Development

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### Move Leadership Development to the Urgent

- Real accountability in the Lead Program
- Give them ownership of leadership responsibilities
- Get them involved as coaches in your office and the community
- Provide the forum for them to be leaders

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## Pierz's Pillars: Building Culture

1. Financial Rep is your client
2. Avoid Triangular Relationships
3. Never underestimate the impact on others of what you say and do
4. See people as they can be
5. Definition of success: Getting as far as you can with what you got
6. Be gracious with your time
7. Don't take peoples monkeys
8. Be present
9. "Thy fault, dear Brutus, lies with you."
10. Support the Leadership Team

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