



Action Learning Guide

Warm-Source Recruiting for Maximum Impact

January 20, 2010

Get PACE credit for this teleconference. See page 10.

Action Learning Guide

Getting the Most Out of the Best Practices Teleconferences

The Best Practices Teleconferences represent what membership in GAMA International is all about. Any GAMA member can dial in to the free teleconferences and listen to a group of award-winning industry peers discuss coping with industry issues through best practices.

Getting the Most Out of the Best Practices Teleconferences is designed to enhance your teleconference learning experience, generate discussion and help you capitalize on the new ideas that you'll hear in the teleconference presentation and discussion. The format is flexible and can be tailored to suit your specific needs. Whether you are working alone or with your leadership team, the guide will help you —

- Examine your own practices related to the teleconference topic
- Identify new ideas that will work in your organization
- Create an action plan to implement new practices.

In This Packet

This guide includes —

- Details about the next teleconference, including topic, call-in numbers and speaker information
- A pre-teleconference discussion worksheet
- A teleconference notes worksheet
- A post-teleconference worksheet and implementation plan
- A teleconference evaluation form
- A schedule of upcoming Best Practices Teleconferences.

How to Use This Guide

Teleconferences are a great way to get your team thinking: “Where are we now? Where do we want to be? How will we get there?” To help you and your team get the most out of a teleconference, we recommend the following activities:

Activity	Timing & Task
Set the Stage	Before the teleconference: Pre-teleconference activities set the stage for learning by answering the question, “Where are we now?” Ask team members to complete the precall questions; then, schedule time to meet as a team before the teleconference to review the questions and identify your team’s goals for the call.
Collect Best Practices	During the teleconference: Ask team members to use the teleconference notes to document key ideas and questions as they listen. If you’re listening live, encourage them to ask questions during the Q&A section.
Identify Opportunities and Next Steps	After the teleconference: This activity will answer the questions, “Where do we want to be?” and “How will we get there?” For best results, complete this activity immediately after the call; then, schedule follow-up meetings as needed. Use the postcall discussion questions and action plan to identify key ideas and steps for implementation.
Tell Us What You Think	After the teleconference: Please complete and return a program evaluation form. You may use the form in this packet or provide your feedback online at GAMA Source http://gama.knowledgelink2.com/login

Best Practices Teleconference: January 20, 2010

Warm-Source Recruiting for Maximum Impact

Research has shown that warm sources are the best source of high-quality candidates. Focusing on warm-source recruiting will maximize your recruiting efforts and ultimately improve long-term retention. Leave this call better equipped to:

- Develop relationships and build trust with sources
- Strategically use centers of influence
- Communicate effectively in multicultural communities

To listen live: Date: Wednesday, January 20, 2010
 Time: 11:00 a.m. – 12:00 noon, Eastern time
 Register: <https://services.choruscall.com/links/gama100120.html>
 Conference ID: 434285

You must register online to participate in this conference. Once you register for the call online, you will receive a dial-in number and individualized PIN. Please keep this information, as you will need it to access the call.

To listen later: GAMA members can tune in to a recording of the call or download it and listen at a later date. Teleconferences are archived at GAMA Source.
To access GAMA Source, select the GAMA Source logo on GAMA's [Web site](http://www.gamaweb.com) at <http://www.gamaweb.com>. To login, enter your user ID (your 7-digit member number, located on your membership card and on your Journal mailing label) and password (your last name, with no spaces or punctuation).

Speakers: Hugo Castro, CLU ChFC CFP LUTCF, AXA Equitable
 Cynthia Griffith, AIC SCLA LTCP, State Farm Insurance Companies
 Cheryl A. Hubbard, CFP CFBS, MassMutual Financial Group

Moderator: Ross Borzin, CLU, MassMutual Financial Group

Hugo Castro, CLU ChFC CFP LUTCF

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Cynthia Griffith, AIC SCLA LTCP

Agency Recruiter

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Phone: (304) 254-7383

Email: cindy.griffith.guok@statefarm.com

Cindy Griffith is an agency recruiter for State Farm Insurance Companies where she handles the entire state of West Virginia.

Cindy has been with State Farm for almost 15 years. She processed auto claims for 10 years in Ohio and West Virginia before moving to Beckley, WV in 1999 and handling claims until 2005. She became an agency field specialist in 2005, providing training to agents and their team members. In January 2007, she became an agency recruiter. Cindy has embraced this role because she is able to help people realize the dream of owning their own business as a State Farm agent.

Cindy holds the Associate in Claims (AIC), Senior Claims Law Associate (SCLA), and Long-Term Care Professional (LTCP) designations. She is currently working on Chartered Financial Consultant (ChFC).



Cheryl A. Hubbard, CFP CFBS

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Cheryl Hubbard has 23 years experience in the financial services industry and holds a Certified Financial Planner designation (CFP®) and is a Certified Family Business Specialist. She is a graduate of University of Wisconsin, Stevens Point with a degree in business and psychology.

Recently in 2009, Cheryl joined Capstone Financial Partners of MassMutual in Atlanta. As a sales manager and partner with Capstone, Cheryl's responsibilities include attracting new associates and building a team of successful financial advisors by increasing the equity in their practices through coaching, mentoring and professional development. Prior to joining Capstone, Cheryl built a Top 10 MassMutual detached sales unit from scratch and finished third nationally in her category with MassMutual in Wisconsin in 2007.

In 2000, Cheryl was recognized for her achievements by receiving the Athena Award, an international award that recognizes individuals for their professional work as well as commitment to community service in the Wisconsin area. Here in Atlanta, Cheryl continues to be active in her community, Cheryl is involved with multiple professional business organizations and charities including:

- The Financial Planning Association (FPA)
- Women in Insurance and Financial Services (WIFS)
- The National Association of Insurance and Financial Advisors (NAIFA)
- Estate Planning Council of North Georgia (EPCNGA)
- Cobb Chamber of Commerce
- Cobb Executive Women



Ross Borzin, CLU

Manager
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Ross Borzin is an agency manager with MassMutual Financial Group. Borzin focuses on retirement planning, qualified and non-qualified benefits and business succession planning.

Borzin is also past president of the Silicon Valley Association of Insurance and Financial Advisors (2004-2005) and past president of The Society of Financial Services Professionals (2001-2002).

Borzin graduated from Oklahoma University in 1981, with an M.B.A. in finance and marketing. Borzin then entered the insurance and financial services industry in January 1984 with Equitable Assurance Society.

Borzin holds the Charter Life Underwriter (CLU) designation and is a qualifying member of the Million Dollar Round Table (MDRT) and currently serves on the GAMA International Professional Development Committee.

His hobbies include coaching soccer and baseball. He has been married to Patricia for 27 years, and they have four sons. Ross is an avid and faithful San Francisco Giants fan and San Francisco 49ers fan.

Set the Stage: Where Are We Now?

Consider the following questions related to the teleconference topic and discuss them with your team.

Program Date: *January 20, 2010*

Program Title: *Warm-Source Recruiting for Maximum Impact*

1. What are we currently doing to address today's topic? What issues or obstacles are we currently facing?

2. What has worked for us?

3. What has not worked?

4. What are our goals for this teleconference? What do we need to learn?

5. What information do we want to hear or ask about?

Teleconference Notes: Collect Best Practices

The following questions will be discussed during the teleconference. As you listen to the speakers' discussion and the Q&A, write down anything you want to discuss after the teleconference.

Program Date: *January 20, 2010*

Program Title: *Warm-Source Recruiting for Maximum Impact*

1. Tell us little about your firm and your networking groups. How did you get started? Please share some key details about how your operation works.

2. Can you share with us your success in recruiting and market penetration through using warm nominators?

3. How often you meet with your nominators and center of influence?

4. What especially about your networking group has led to an increase in manpower growth and retention?

5. What challenges and opportunities do you see on the immediate horizon regarding growing your firm? What strategies are you using to increase diversity among your recruits?

6. Do you use either (or both) Career Builder and/or Monster.com to do your recruiting? If so, please tell us about your experience using web-based recruiting?

Identify Opportunities and Next Steps: Where Do We Want to Be?

Use this worksheet and subsequent discussion to identify new ideas that will benefit you and your team.

Program Date: *January 20, 2010*

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1. What was the biggest "a-ha" or take away that you got from today's program?

2. What other key points did you note?

3. How do the ideas discussed in the teleconference differ from your own practices? How are they similar?

4. Is there anything you will start or stop doing as a result of what you learned today?

5. What activities will you reevaluate based on the information the speakers shared? What do you think should change?

Identify Opportunities and Next Steps: How Do We Get There?

What new ideas would you like to implement in your organization? Brainstorm a few preliminary actions that you will need to take. You can follow up later with a more detailed plan.

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1. New idea:

Steps we need to take:

Who will follow up?

2. New idea:

Steps we need to take:

Who will follow up?

3. New idea:

Steps we need to take:

Who will follow up?

Tell Us What You Think: Teleconference Program Evaluation

Your feedback helps GAMA International deliver timely information and cutting-edge techniques for building your business. Thank you for taking time to share your thoughts with us!

After completing the evaluation, please fax to Lesley Hadley at 571-499-4302. You can also share your feedback online on the GAMA Source page at <http://www.gamaweb.com>.

Program Date: *January 20, 2010*

Program Title: *Warm-Source Recruiting for Maximum Impact*

1. Using a scale of 1 (Very Dissatisfied) to 10 (Very Satisfied), please rate the following:

Program	Rating	Moderator & Speakers	Rating	
			Content	Delivery
Relevance of topic		Hugo Castro		
Q&A session		Cynthia Griffith		
Length		Cheryl Hubbard		
Format		Ross Borzin		

2. How many people were in the room listening to the conference with you?

3. What topics interest you for future programs?

- | | | | |
|---|---|---|---|
| <input type="checkbox"/> Business Strategy & Growth | <input type="checkbox"/> Diversity | <input type="checkbox"/> Frontline Leader Development | <input type="checkbox"/> Leadership & Culture |
| <input type="checkbox"/> Performance Coaching & Mentoring | <input type="checkbox"/> Producer Development | <input type="checkbox"/> Recruiting & Selection | <input type="checkbox"/> Retention |
| <input type="checkbox"/> Sales & Marketing | <input type="checkbox"/> Supervision & Accountability | <input type="checkbox"/> Other (please list:) | |

4. Would you recommend the Best Practices Teleconferences to a colleague? Yes No
Explain.

5. How can we improve future teleconferences?

6. Additional comments.

In order to receive PACE Credit for this live call, you must submit this form. Please fill in the information below if you are interested in receiving PACE Credit.

Name: _____

GAMA Member # _____



JAN. 20, 2010, 11 AM EST



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- Develop relationships and build trust with sources
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- Communicate effectively in multicultural communities.

Moderator: Ross Borzin, CLU, MassMutual Financial Group

APRIL 21, 2010, 11 AM EST



Achieving Excellence in Frontline Management

Increase productivity and retention of your new frontline leaders with tools that will give them traction in their first 12 months. Build critical skills that allow frontline leaders to excel in —

- Recruiting and selecting the best possible team
- Setting expectations and coaching for performance
- Building and maintaining strong relationships with their advisor teams.

Moderator: Lily Fong, American General Life and Accident

JUNE – PODCAST



Beyond Project 100

Project 100 has been a trusted standby. However, obstacles like the do-not-call list have interfered with its effectiveness. Make selection decisions with greater confidence and increase productivity by transitioning new advisors to a market-driven system instead of simply selling to family and friends. Accelerate results by —

- Determining which candidates have a natural market
- Coaching your advisors to develop centers of influence and overcome obstacles that interfere with a successful start.

Moderator: Kerry L. Lawing, Ohio National Financial Services

JULY PODCAST



Leveraging Life Insurance Awareness Month

Enhance your marketing efforts by capitalizing on Life Insurance Awareness Month. This podcast will include practical ideas to increase life insurance sales by —

- Maximizing the Life Foundation's resources to generate more life sales
- Complementing your marketing efforts with industry resources
- Motivating your team around a common cause by increasing their focus on life sales and their passion for the industry.

Moderator: Daniel L. Lawrence, CLU ChFC FIC LUTCF, Modern Woodmen of America

SEPT. 15, 2010, 11 AM EST



Finish the Year Strong

Discover strategies to accelerate fourth-quarter performance. Increase sales production and improve retention with methods that —

- Motivate agents to become proactive through performance measurement
- Increase the impact of target campaigns
- Improve cross-selling opportunities.

Moderator: Maurice B. Springer, New York Life Insurance Company

NOV. 17, 2010, 11 AM EST



Connectivity Across Generations

Create an inclusive culture by fostering generational diversity. Balance the needs of different generations to increase effectiveness. Listeners will learn strategies to —

- Tailor recruiting efforts to generational needs
- Maximize training by using the right tools and techniques for each generation
- Create cross-generational opportunities for joint work, mentoring, and learning.

Moderator: Dave Saviage, M.B.A., ChFC FIC, Thrivent Financial for Lutherans

GAMA International Learning Tracks

= Business Strategy & Growth	= Diversity	= Frontline Leader Development
= Leadership & Culture	= Performance Coaching & Mentoring	= Producer Development
= Recruiting & Selection	= Retention	= Sales & Marketing
= Supervision & Accountability		