



Action Learning Guide

Connections That Make a Difference

January 18, 2012

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 18, 2012

Connections That Make a Difference

It is important to find not only a great candidate, but the right candidate. This requires sourcing and selecting successful and dedicated producers. Randal, Chris, and Allyson will discuss where to find good recruits and how to make the connections that will bring you candidates who will not only be highly productive, but remain in the industry for years to come.

To listen live: Date: Wednesday, January 18, 2012
Time: 11:00 a.m. – 12:00 noon, Eastern time
Register: <http://services.choruscall.com/links/gama120118.html>
Conference ID: 10006258

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 in all lowercase letters, with no spaces or punctuation).

Speakers: Randal Espey, LUTCF
Guardian Life Insurance Company of America
Christopher Wagner, LUTCF
Mutual of Omaha Insurance Company
Allyson Watts, CLU ChFC
State Farm Insurance Companies

Moderator: Craig Long, ChFC, Mutual of Omaha Insurance Company



Randal C. Espey, LUTCF
General Agent
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Randal has more than 28 years of experience in the financial service industry. He has worked with major financial services firms like MetLife, Guardian, and MassMutual. After starting his financial services career in sales, straight out of the University of Texas at Austin, Randal moved into agency management and then regional and home office positions. He has helped many general agents across the country grow highly successful agencies in their local markets through high-end recruiting and development systems. Six years ago, he started his own general agency and moved it to a Guardian general agency where he recruited 16 new field representatives his first full year and 25 new brokers two years ago. Now he has more than 20 field representatives and almost 60 brokers. Randal was born and raised in Houston and relocated to the North Atlanta area nine years ago. He and his wife Kim have three children Brady, 22, Grayson, 18, and Mimi, 17. Randal currently serves on the local board for the Life Underwriters Association and is president elect for the North Atlanta chapter. He has taught CFP courses at the college level for three years and has a LUTCF designation.



Christopher M. Wagner, LUTCF
General Sales Manager
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Christopher M. Wagner, LUTCF, joined Mutual of Omaha in May 2004, directly out of college. In 2007, he moved into a recruiting role and later a mentor role. Chris qualified for GAMA's Frontline Leader Award at the Silver level and has been recognized by Mutual of Omaha twice for production. In 2011, he was named general sales manager of eastern Iowa and has started scratch offices in Iowa City and Davenport.



Allyson B. Watts
Agency Field Executive
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Allyson joined State Farm Insurance Companies in 1995 as an automobile claim representative in Baton Rouge. She became an agent in Westminster, Colo., in 2000 and was appointed an agency field consultant in the Southern Zone's Atlanta Metro Southeast Agency Field Office in 2004. Allyson became a zone agency administrative assistant and acting zone marketing manager in December 2007. She assumed her current role of agency field executive in the Atlanta Metro Midtown Agency Field Office in January 2009. Allyson's market area covers three metro counties and 48 agents.

Allyson has a bachelor's degree in business administration/marketing from Louisiana State University. She and her husband, Chad, have two sons: Parker and Peyton.



Craig A. Long, ChFC
Agency Operations Manager
Mutual of Omaha
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Craig Long serves as agency operations manager with Mutual of Omaha in the Great Plains Division Office, which covers five Midwestern states.

Craig has been in the financial services industry since 1993. The first 11 years were dedicated exclusively to building a successful practice, where he achieved his companies highest production award his last five years as an advisor. Craig has since focused on mentoring and training new advisors. He has earned several management awards and serves on GAMA's Professional Development Committee.

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 18, 2012*

Program Title: *Connections That Make a Difference*

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 18, 2012*

Program Title: *Connections That Make a Difference*

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1. We keep hearing about social media recruiting; what is it and how are you using it?
-
2. What do you look for when viewing people on social media? How do you reach out to them so you get the best chance to discuss our career? How much time do you spend daily on this type of recruiting?
-
3. College recruiting is a big part of your practice. How did you get started within the colleges? What areas within the colleges did you reach out to?
-
4. What involvement are you doing on campus? What is the average time commitment?
-
5. A Talent Scout referral culture (from advisors and centers of influence) is something everyone wants to get to. How did you get this started within your agency? With whom do you discuss Talent Scout referrals and what type of follow-up do you do with them?
-
6. Are you using any type of cold sources such as Monster, Career Builder, or Career Fairs? Why/Why not?

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 18, 2012*

Program Title: *Connections That Make a Difference*

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.

Program Date: *January 18, 2012*

Program Title: *Connections That Make a Difference*

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 Jen D'Alessio at 571-499-4302. You can also share your feedback online on the GAMA Source page at <http://www.gamaweb.com>.

Program Date: *January 18, 2012*

Program Title: *Connections That Make a Difference*

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

Program	Rating	Moderator & Speaker	Rating	
			Content	Delivery
Relevance of topic		Randal Espey		
Q&A session		Christopher Wagner		
Length		Allyson Watts		
Format		Craig Long		

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 # _____

