



# GAMA International presents The Essentials of Leadership and Management

## Overview

GAMA International's **The Essentials of Leadership and Management** is an intensive five-day management development course organized around the vital elements required for building an agency or firm strong enough to grow and thrive in today's world. These elements lay the groundwork for the most impactful take-away from any seminar or training that participants will experience in their careers: a formal business plan that covers all areas of agency development.

**Classes typically run Monday 7:00 a.m. – 6:00 p.m., Tuesday through Thursday 8:00 a.m. – 6:00 p.m. and Friday 8:00 a.m. – noon.** Daily participation and completion of exercises is critical to your success. Please be prepared to spend an additional 2 to 2.5 hours each evening applying the day's lessons to your agency or firm.

## Materials List

Please bring these items to class with you:

- √ Paper, writing utensils and highlighters
- √ A laptop computer
- √ Your Mission Statement & Value Proposition statement, if you have them
- √ Your job description, if you have one
- √ Three-, five- and ten-year agency vision statements
- √ A list and examples of any selection tools you use
- √ A list and example of any training tools you use (for accountability training and monitoring)

**You will receive a pre-course assignment packet prior to the class with complete instructions for the following items.**

- GAMA 360 Leadership Assessment—(Powered by Star360)
- The names of your producers & staff
- Individual and agent production reports for the last two (2) years

## Agenda

Highlights from each unit are listed below.

### Day 1 – Unit 1: Leadership, Vision and Values

- Study successful leadership styles and adapt them to your personality and disposition.
- Develop an energizing vision to motivate your team and guide your organization's growth.
- Understand some of the tough decisions required to run an effective organization.

### Day 2 – Unit 2: Recruiting, Selection and Retention

- Learn the critical elements of a recruiting plan.
- Define the characteristics of your ideal candidate.
- Develop a consistent process to select candidates who can and will succeed in your organization.

### Day 3 – Unit 3: Training, Supervision and Accountability

- Put in place the training, supervisory, and accountability processes to enable you to teach ordinary people to deliver extraordinary performances.
- Learn proven techniques that keep your financial advisors motivated and focused on the activities required to keep them growing.

### Day 4 – Unit 4: Personal Development and Goals

- Determine your managerial style and approach to management.
- Assess your organization's climate and learn techniques to improve it.
- Explore opportunities for building your organization through strategic alliances.

### Day 5 – Graduation

- Present Your Business Plan.