



GAMA
INTERNATIONAL

DATE:
JUNE 9-13, 2008

MODERATOR:
CONK BUCKLEY,
CLU CHFC FLMI

Facility:
Securian– 400 Building
8th Floor Leadership Room
400 Robert Street North
St. Paul, MN 55101

GAMA Contact: Lesley
Hadley
Phone: 703.770.8170

The Essentials of Leadership and Management

is a results-oriented program that will dramatically improve your organization's growth and success. Many training -programs TELL you how to build your field organization, but *The Essentials* SHOWS you how to do it, step by step. Exciting concepts, challenging exercises, a highly interactive environment, and skilled facilitators are combined into a powerful learning experience.

Class Logistics

Pre-Work/Homework/Computer:

GAMA will e-mail you, as part of your pre-work, instructions and a business plan template (in **Microsoft Word**) for completion. A small portion of the business plan must be completed prior to the beginning of class. Basic knowledge of Microsoft Word and PowerPoint will be extremely useful in completing your class assignments.

Materials: Please see the list of required materials on the following page.

Class Schedule:

7:00 a.m. – 6:00 p.m., Monday

8:00 a.m. – 6:00 p.m., Tuesday through Thursday

8:00 a.m. – 12:30 p.m., Friday*

***You are required to be here until 12:30 p.m. – please allow for travel time to airport when scheduling your return flight.**

Dress: Monday-Thursday: Business Casual; Friday: Business

Registration and Cost: See attached Residency Application.

Hotels: Please contact Cindy Follmer at 651.665.3901 for hotel reservations.

Embassy Suites

175 East 10th Street

Saint Paul, MN 55101

Phone: 651-224-5400

Airports: Minneapolis/St. Paul International Airport

Airport shuttle service: We recommend the Embassy Suites shuttle service. Cost is \$20.00 per round trip. Taxis are also available.

Directions to airport shuttle pick-up area:

After picking up your luggage, take the elevator or escalator down one level. Follow GROUND TRANSPORTATION signs to the designated pick up area. Look for the shuttle bus from Embassy Suites of St. Paul.

If your flight is delayed or cancelled, or you have any other after hours concern/or emergency, please contact Cindy Follmer.

Class Overview

GAMA International's *The Essentials of Leadership and Management* is an intensive five-day management development course organized around five 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 highest impact 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 will run 7:00 a.m. – 6:00 p.m., Monday, 8:00 a.m. – 6:00 p.m. Tuesday through Thursday and 8:00 a.m. – 12:30, Friday. 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.

Please bring these items to class with you:

Materials Checklist

- Paper, writing utensils, and **highlighters**.
- A laptop computer with PowerPoint. **NOTE:** Please make sure you have PowerPoint loaded on your laptop **before** the class begins. You will utilize your laptop in the evenings when you are doing homework, working on your business plan, and creating your PowerPoint presentation.
- CD-ROM or memory stick.
- Your mission statement and 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 two assignments, via email, to be completed before the class begins.

1. Complete the 360° online leadership assessment.
2. Complete the Business Plan Activity as detailed in the pre-course assignment packet.

Class Agenda

7:00 a.m. – 6:00 p.m. Day 1 – Unit 1: Leadership, Vision and Values

- Study a variety of successful leadership styles and techniques and adapt them to your personality and disposition.
- Develop your business vision to energize your team and guide your organization's growth.
- Tie your vision to your personal values.
- Create an environment that attracts and retains high-quality people.
- Understand some of the tough decisions required to run an effective organization.

8:00 a.m. – 6:00 p.m. Day 2 – Unit 2: Recruiting, Selection and Retention

- Define the characteristics of your ideal candidate.
- Recognize the importance of long-term building decisions for your organization versus short-term solutions
- Build your recruiting plan based on proven practices of top performers.
- Develop a consistent process to select candidates who can and will succeed in your organization.

8:00 a.m. – 6:00 p.m. 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.
- Develop a structured supervisory system that delivers training and education during the first five years of the advisor's career.
- Learn proven techniques that keep your financial advisors motivated and focused on the activities required to keep them growing—financially and professionally.
- Understand the role of accountability groups and the results they can bring to individuals and the organization.

8:00 a.m. – 6:00 p.m. Day 4 – Unit 4: Personal Development and Growth

- Determine your managerial styles and approach to management.
- Discover your professional strengths and weaknesses.
- Explore the techniques to develop opportunities and compensate for weaknesses.
- Assess your organization's climate and learn techniques to improve it.
- Explore opportunities for building your organization through strategic alliances.
- Learn signs for identifying management talent in others.

8:00 a.m. — 12:30 p.m. Day 5 – Graduation

- Present Your Business Plan

The Essentials of Leadership and Management Residency Application

St. Paul, MN

Class Location

Dates: **June 9**

From

June 13, 2008

To

Name

Designations

Title

GAMA International Member ID #

Company

Firm/Agency

Business Address

City

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State

()

Zip

Country

Phone

Fax

E-mail

Card Number

Expiration Date

Billing Address Zip Code

Signature

Registration fee: GAMA International Member* - \$1,795 Non-member - \$1,995

Form of Payment: Personal Check Company Check Visa MasterCard AMEX

Participant Agreement

I understand that certification for completion of *The Essentials* course is based upon my class participation, completion of assignments and the submission of a final business plan. I also understand that I am not eligible for a refund of my tuition if I withdraw from the program once the first class has begun. **Please note:** GAMA International reserves the right to cancel or reschedule classes should circumstances warrant.

Signature

Date

Cancellations and No-Shows

☞ Cancellations must be received in writing at least 10 business days before the class start date to obtain a refund. A \$150.00 cancellation fee will apply.

☞ Registrants who do not cancel at least 10 business days before the class start date will not receive a refund or credit of fees.

Submit your registration to GAMA International:

By Mail: GAMA International, 2901 Telestar Court, Suite 140, Falls Church, VA 22042-1205

By Fax: 703.770.8182 (Attn: Lesley Hadley) (credit card payment only)

☞ **GAMA International does not reserve seats for Open Enrollment classes. Registration is NOT complete until GAMA International is in receipt of this signed registration form.**