



# GAMA

INTERNATIONAL

DATE:  
OCTOBER 5-9, 2009

MODERATOR:  
ROBERT C. AVERNA,  
CLU

## *The Essentials of Leadership and Management*

Facility: GAMA International -  
Conference Center  
2901 Telestar Court, 1st Floor  
Falls Church, VA 22042

GAMA Contact: Lesley  
Hadley  
Phone: 703.770.8170

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 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.

We recommend that you do not depart prior to 2:30pm.

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

**Registration and Cost:** See attached Residency Application.

**Hotels:** Participants are responsible for making their own travel and hotel reservations with Homewood Suites by Hilton.

## **Homewood Suites by Hilton**

8130 Porter Road

Falls Church, VA 22042

**Phone:** 703.560.6644

**Special Room Rate:** \$199.00 per night plus taxes

\*When making reservations please inform the hotel that you qualify for the GAMA room rate.

**Airports:** Reagan National Airport (30-40 minutes)

Washington Dulles Airport (40-45 minutes)

**Taxi/Limo Service:** We recommend U.S. Executive Sedan & Limo Express at 800.868.0792 to reserve a car to pick you up. Cost is about \$45.00 (either from Dulles or Reagan National) – this is a great deal and only about \$5.00 more than a taxi!

# 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 p.m., 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

**Falls Church, VA**

Class Location

Dates: **October 5**

From

**October 9, 2009**

To

Name

Designations

Title

GAMA International Member ID #

Company

Firm/Agency

Business Address

City

( )

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.**

# Registrations must be received by August 31, 2009.