



EDGE Content Library

EDGE helps leaders succeed at every stage of the leadership journey. This comprehensive digital content library teaches essential skills for building a thriving business, creating a high-performance culture, and everything in between. Whether you want to strengthen your own leadership skills or build your leadership team, and whether you are new to leadership or have years of experience, **EDGE** has a solution for you.

INTRODUCTION TO EDGE

- Getting Started with FSLEdNet

RESEARCH LEADERSHIP STUDIES

- Virtual Recruiting Research
- Virtual Onboarding Research
- Virtual Accountability Research

PRE-MANAGEMENT ORIENTATION

THE SCIENCE

- Is Management the Right Role for You?
- What Do Sales Managers Do?
- The Profile of a Successful Sales Manager
- Should You Consider Going into Management?
- Should a Sales Person Give Management a Trial Run?

THE ART

- Transitioning Agents into Managers
- Why Management? A Passion for Leadership
- Considering a Career in Sales Management

A LEADER'S PHILOSOPHY

THE SCIENCE

- A Leader's Passion for Building Others - Part One
- A Leader's Passion for Building Others - Part Two
- The Leadership Mindset
- Growing Your Team of Leaders by Attracting Other Leaders
- The Golden Rule is the Best Rule for Business
- Leadership From a Legend
- Lead From the Front - Get Out of the Ivory Tower
- The Multiplying of Leaders
- Getting Buy-In and Consensus

- The Power of Encouragement
- Developing Purpose in Others
- Belief In the Product
- Transitioning from Micro-Managing to Leadership
- The Dangers of Sarcasm for a Leader
- Planning a Legacy of Success

THE ART

- Hoopis' Simple Rules of Life: Part 1
- Hoopis' Simple Rules of Life: Part 2
- Hoopis' Simple Rules of Life: Part 3
- Face the Fear: Always Leave Room For Change

FOUNDATIONAL PRINCIPLES OF LEADERSHIP

THE SCIENCE - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - GENERAL

- Roles and Responsibilities of a Leader
- Avoid Perfectionism to Lead Others
- Investing In Your Business
- Enthusiasm- A Leader's Key to Attracting Others
- The Four Developmental Levels of Situational Leadership
- Situational Leadership: Diagnosing Where Advisors Are
- Integrating Situational Leadership into Your Organization

THE ART - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - GENERAL

- Four Questions Leaders Should Ask Themselves
- The Two B's + Four C's of Leadership
- How You're Perceived: Three Words to Describe You
- Identifying When You May Be the Problem
- Resilience: What Every Leader Needs to Know
- Reasons Why People Follow Good Leaders: Questions to Ask Yourself
- Qualities of a Good Leader: Admitting Mistakes & Avoiding Bad Decisions
- Applying the Right Leadership Style for Your Advisors
- The Importance of Creating Clear and Consistent Expectations Among Your Leaders

- Developing High Performing Teams: Inspecting What You Expect
- Six Critical but Often Forgotten Aspects of Leadership
- Leadership Styles that Work: Overleading vs. Underleading
- Improving Yourself and Business: Review, Readjust and Release
- Set up for Success: Developing Sales Managers
- Taking the Next Step: Transitioning Your Sales Managers to General Agents
- Developing High Performing Teams: Taking Ownership When Things Go Wrong
- The Only Way to Grow: Leadership Development
- ALPS Leadership Principles for Success (Part 1)
- ALPS Leadership Principles for Success (Part 2)
- Creating a Leadership Track
- Growing People

THE SCIENCE - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - VISIONS, MISSIONS, VALUE PROPOSITION

- Importance of a Mission Statement and Core Values
- How to Write a Mission Statement – Part One
- How to Write a Mission Statement – Part Two
- How to Write Core Values for Your Firm
- How to Define and Write Your Value Proposition
- Delivering Your Value Proposition

THE ART - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - VISIONS, MISSIONS, VALUE PROPOSITION

- Keeping Your Vision in Focus When Leading an Organization
- Chaotic and Confusing: When Organizations Lack Vision
- Creating Buy-In On Your Vision to Your Team and Organization
- Three Hero Habits: The Guide to Thriving in Corporate America and Life
- Three Hero Habits for Great Leaders: Designing a Winnable Game
- Three Hero Habits for Great Leaders: Assuming Positive Intent
- Three Hero Habits for Great Leaders: Choosing Happiness

THE SCIENCE - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - CREATING A COLLABORATIVE ENVIRONMENT

- Overview of the Elements Of Trust
- Inadvertent Mistakes that Kill Trust

- Creating a Collaborative Culture
- Building a Great Company Culture
- Delegation: The Key to Growth
- Keys to Good Delegation - Part One
- Keys to Good Delegation - Part Two
- The WOW Factor - Part One
- The WOW Factor - Part Two

THE ART - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - CREATING A COLLABORATIVE ENVIRONMENT

THE SCIENCE - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - OFFICE SYSTEMS AND PROCESSES

- Understanding Time Management
- Time Management Concepts and Practices
- Proven Time Management Techniques
- STOP Procrastinating!

THE ART - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - OFFICE SYSTEMS AND PROCESSES

- Leading Your Organization Through Change Management
- Internal Transparency During Change Management
- The Importance of Communicating Change to Clients
- Building Firms by Creating Capacity
- Building Firms by Creating Capacity: Planning & Market Identification
- Building Firms by Creating Capacity: The Ideal Candidate Profile for the Market
- Building Firms by Creating Capacity : Activity Management & Protégé Development

THE SCIENCE - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - UTILIZING RESOURCES

- Utilizing Company Specialists to Build Your Firm
- Utilizing Local Resources to Build Your Firm
- Utilizing Company Resources to Build Your Firm

THE ART - FOUNDATIONAL PRINCIPLES OF LEADERSHIP - UTILIZING RESOURCES

THE RECRUITING PROCESS

THE SCIENCE - THE RECRUITING PROCESS - GENERAL

THREE STAGES OF THE RECRUITING PROCESS

- Three Stages of Recruiting - The Finding Stage
- Three Stages Of Recruiting - The Selection Stage
- Three Stages Of Recruiting - Momentum Building Stage

NEVER BE OUT OF SIGHT OR OUT OF MIND

- Staying Top of Mind with Candidates
- Importance of Follow-up When You Miss a Recruit
- Cultivating Nominators or Centers of Influence
- Planning a Referral Culture
- Building a Referral Culture
- Brainstorming for Recruiting Referrals
- The Importance of Developing a Recruiting Culture

UNDERSTANDING AND DETERMINING A SUCCESSFUL CANDIDATE PROFILE

- The Unique Needs of Female Associates
- Why Keep a Candidate Profile
- Creating an Ideal Candidate Profile
- Millennials and Baby Boomers Serving Each Other

SOCIAL MEDIA SERIES

- Building Your Social Media Presence
- Discovering Qualified Online Candidates
- Using LinkedIn to Recruit
- When to Pass on a Candidate
- Opportunities in Virtual Recruiting

DIVERSITY AND INCLUSION

- Finding Women Candidates Outside Your Natural Market
- Event Best Practices Targeting Women Advisors
- Walking the Walk: The Women's Initiative Program
- Recruiting with D&I in Mind Shouldn't Change your Process
- Diversity & Inclusion: What that Looks Like Within an Organization
- How Inclusiveness Affects Recruiting

SETTING UP YOUR RECRUITER FOR SUCCESS

- Building a Close Rapport with Your Recruiter on Day 1
- The Importance of Weekly Check-In's with Your Recruiter

THE ART - THE RECRUITING PROCESS - GENERAL

- The Three R's of Agency Building: Recruiting
- Positioning the Career During the Recruiting Process
- Planning Your Recruiting Year
- Generation Y: A Once in a Lifetime Recruiting Opportunity
- Building a Barrier-Free Recruitment Process
- Challenges of "Filling the Room" When Organizing Events
- Cultivating Referral Sources & COI Development
- Tactical Strategies to Build Your Own Networking Group
- Creating a Recruiting Culture
- Recruiting Best Practices
- Conducting a Recruiting GAP Analysis
- Center of Influence Development
- Skills & Traits for a High Quality Recruiter
- Diversity and Inclusion
- My Personal Journey: Attracting Women to The Industry
- Committing to Becoming an Ally in Demographics Different from Yours
- The Uniqueness When Engaging in the Asian Community
- The Uniqueness When Engaging in the Latino Community
- The Uniqueness When Engaging in the LBGT+ Community
- Three Steps to Assess Inclusivity in Your Organization
- Education is Key to Inclusiveness
- Building Authentic Connections in Diverse Spaces
- Trust & Rapport: Engaging in Diverse Spaces for Advisors and Companies
- Being Mindful of Cultural Nuances When Engaging in Diverse Markets
- What is Implicit Bias
- How Implicit Bias Affects Your Practice
- The Dangers of "Culture Fit"
- Identifying and Acknowledging Your Implicit Bias
- Detect, Reflect, Reject: Identifying Bias
- Learning from One Another: Responding to Criticism

- Becoming an Impactful & Active Bystander
- It Starts with You: Be Your Authentic Self
- Taking Responsibility Educating Yourself about D&I
- Changing from the Inside Out: Being Vulnerable
- Understanding Microaggressions
- Finding Advocates in the Workplace
- Navigating the Double Standard & Moving Forward
- How an Inclusive Culture Can Affect Sales
- How to Thrive Without 'Putting on Your Armor'
- Changing Your View on "Being Emotional"
- How to Recruit, Train and Retain Women

THE SCIENCE - THE RECRUITING PROCESS - THE FINDING STAGE

- Finding Stage - General
- Recruiting the Highest Quality - Part One
- Recruiting the Highest Quality - Part Two
- Recruiting Candidates Without the Benefit of Benefits
- Recruiting Candidates That Do Not Need Benefits
- Early Warning Signs Someone is Not a Culture Fit
- How to Attract Female Associates
- Brainstorming for Recruiting Referrals

FINDING STAGE - INEXPERIENCED CANDIDATES

- Sources for Gathering Names of Potential Candidates – Part One
- Sources for Gathering Names of Potential Candidates – Part Two
- Developing Your Messaging to Attract Future Top Performers - Part One
- Developing Your Messaging to Attract Future Top Performers - Part Two
- Attracting Inexperienced Candidates That Are Future Stars - Part One
- Attracting Inexperienced Candidates That Are Future Stars - Part Two
- Attracting New Candidates
- Selection of High Quality Candidates
- What Attracting Millennials Can Teach Us About Everyone – Part One
- What Attracting Millennials Can Teach Us About Everyone – Part Two
- Benefits of Reverse Selling
- Encore Career Candidates

- Having a Profile for Inexperienced Hires
- Attracting the Next Generation of Sales Talent, Segment 1
- Attracting the Next Generation of Sales Talent, Segment 2

HOW TO FIND AND SELECT THE BEST COLLEGE GRADUATES

- An Ideal Candidate Profile
- Sourcing Recent College Graduates
- Recruiting and Selection of College Graduates – Part One
- Recruiting and Selection of College Graduates – Part Two

HIRING MILITARY

- Why Hire a Veteran
- How to Identify and Hire Former Military Members
- Overview of Hiring Veterans – Part One
- Overview of Hiring Veterans – Part Two
- The Natural Market for Veterans
- The Military Selection Process
- Benefits of Recruiting Military Veterans
- Having a Plan When Recruiting Military Veterans
- Questions to Ask & Not to Ask When Recruiting Military Veterans

INDEPENDENT EXPERIENCED CANDIDATES

- Overview of Experienced Independent Producers
- Developing Your Value Proposition Targeting New Independent Hires
- Creating Your Value Proposition for Recruiting Independent Professionals
- Independent Professionals - Are They a Fit for Your Firm?
- What the Independent Producer Seeks
- Reasons Independents May Affiliate with Your Firm - Part One
- Reasons Independents May Affiliate with Your Firm - Part Two
- Profile for Independent or Experienced Candidates
- Template for Recruiting Experienced & Independent Life Producers - Part One
- Template for Recruiting Experienced & Independent Life Producers - Part Two
- Sources to Recruit Independent Producers
- The First Impression - Recruiting or Wholesaling Experienced Associates
- Using Brokerage as a Recruiting Tool
- The Self-Disclosure - Making a Great First Impression
- Show Me - Recruiting Experienced Independent Associates

- Understanding How to Attract Future Top Performers
- The Long Sell-Cycle of Recruiting Independents

THE ART - THE RECRUITING PROCESS - THE FINDING STAGE

- Strategies for Successful Recruiting and Retention Culture
- The Observation: Approaching Candidates in Everyday Situations
- Recruiting Role Play: Needs Based Recruitment Interview
- The Needs Based Recruitment Interview
- The Personal Observation Method in Recruiting
- Strategies for Increasing Recruitment by Sourcing Diversity
- Recruiting Role Play: The Approach
- Use Your Networking Skills to Recruit
- Practical Tips for Social Media Recruiting
- Positioning the Commission Opportunity
- Campus Recruiting: Widening the Funnel
- Campus Recruiting: Developing Centers of Influence

THE SCIENCE - THE RECRUITING PROCESS - THE SELECTION STAGE

SELECTION STAGE - GENERAL

- When to Pass on a Candidate
- Affiliating Non-Benefited or 1099 Associates

SELECTION STAGE - INEXPERIENCED

- Traits of Top Performers – Part One
- Traits of Top Performers – Part Two
- How to Conduct an Initial Recruiting Interview - Part One
- How to Conduct an Initial Recruiting Interview - Part Two
- The Five Handshake Rule - Part One
- The Five Handshake Rule - Part Two
- Hiring to the Proper Mindset of Inexperienced Candidates
- Let Them See What It Is Like
- Benefits of Reverse Selling
- Show Me - How to Reverse Sell When Recruiting
- You Will Be Overworked and Underpaid
- Show Me- You Will Be Overworked and Underpaid

SELECTION STAGE - INDEPENDENT EXPERIENCED CANDIDATES

- Recruiting the Highest Quality – Part One
- Recruiting the Highest Quality – Part Two
- How to Screen an Experienced Candidate - Part One
- How to Screen an Experienced Candidate - Part Two
- How to Screen an Experienced Candidate - Part Three

SELECTION STAGE - MANAGEMENT RECRUITING CANDIDATES

- Designing Your Leadership Training Program - Assessing Potential Leaders
- When Someone is Ready to Join Your Leadership Team - Part One
- When Someone is Ready to Join Your Leadership Team - Part Two
- Signs Someone Cannot Lead
- The Objective of Selection
- Refining the Recruitment Process: Screening vs. Selection

THE ART - THE RECRUITING PROCESS - THE SELECTION STAGE

- The Three R's of Agency Building: Retention
- The Three R's of Agency Building: 'Rithmetic
- The Relationship Between Recruiting and New Advisor Activity
- Recruiting High End Career Changer
- Hooking High End Career Changers
- Choosing a Selection Assessment
- Putting More Candidates in to Select Better
- The Science of Selection & Potential to Performance
- Measuring Style vs. Substance in the Recruiting Process
- The Importance of the Candidate Experience & Feedback
- Leveraging the Ideal Candidate Profile in the Selection Process
- Interviewing and Recruiting Super Stars
- Steps in the Selection Process
- Tips for Sourcing and Hiring
- Conducting an Initial Interview
- The Science of Utilizing Selection Profiles
- Avoiding Bad Hires in the Selection Process
- Identifying Top Performers Through Motivation-Based Interviewing
- Selection: Assessing Attitude & Resilience

MOMENTUM BUILDING - GENERAL

- Virtual Onboarding
- Creating High Performance Expectations – Part One
- Creating High Performance Expectations – Part Two
- Keys to Self-Accountability

MOMENTUM BUILDING - INEXPERIENCED CANDIDATES

- On-Boarding & Assimilating New Associates
- How Managers Can Hurt the Pre-Contract Process – Part One
- How Managers Can Hurt the Pre-Contract Process – Part Two
- Momentum Building for New Inexperienced Associates - Part One
- Momentum Building for New Inexperienced Associates - Part Two
- Importance of Joint Field Work – Part One
- Importance of Joint Field Work – Part Two
- Benefits of Joint Field Work
- Guidelines for Joint Field Work
- Planning and Debriefing from Joint Field Calls
- Show Me - Planning a Sales Call
- Show Me - Debriefing After a Sales Call

MOMENTUM BUILDING - EXPERIENCED CANDIDATES

- On-Boarding Experienced New Associates for a Fast Start – Part One
- On-Boarding Experienced New Associates for a Fast Start – Part Two
- Momentum Building for an Experienced Hire
- Setting Expectations for New Experienced or Independent Associates
- Getting Experienced Producers off to a Fast Start

MOMENTUM BUILDING - MANAGEMENT CANDIDATES

- Should You Promote a Top Sales Performer into Management
- The Third Level of Management
- A Progressive Management Development Program - Part One
- A Progressive Management Development Program - Part Two

THE ART - THE RECRUITING PROCESS - THE MOMENTUM BUILDING STAGE

- The Productivity Equation
- Creating an Appointment Setting Culture
- Running Productivity Campaigns to Boost Sales and Create Excitement

THE DEVELOPMENT PROCESS

THE SCIENCE - THE DEVELOPMENT PROCESS - GENERAL

- Retention of Successful Financial Professionals
- What Your Associates Want in Training

3 LEVELS OF TRAINING INTERACTION SERIES

- 3 Levels of Training Interaction - The COP Phase
- Show-Me – COP Activity – New Associate Not on Plan
- Show Me – COP Talk for Accountability – 2nd Year Associate Not on Plan
- 3 Levels of Training Interaction - Coach & Consultant Phase
- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Meeting

CONTINUOUS PROCESS OF IMPROVEMENT – KAIZEN SERIES

- Continuous Improvement – Kaizen – Part One
- Continuous Improvement – Kaizen – Part Two

WHAT DO YOU DO WHEN AN ASSOCIATE WANTS TO GO INDEPENDENT SERIES

- What Do You Do When an Associate Wants to Go Independent - Part One
- What Do You Do When an Associate Wants to Go Independent - Part Two
- Teaching Your Associates How to Market- Not Just Sell

THE ART - THE DEVELOPMENT PROCESS - GENERAL

- Not All In: Why Advisors Fail
- Why Advisors Fail: Lack of Belief in the Product and Process Part 1
- Why Advisors Fail: Lack of Belief in the Product and Process Part 2
- Why Advisors Fail: Lack of Belief in Yourself
- The Value of a Holistic Training Model
- The Art of Crafting the Role Play Exercise

- Building Firms by Creating Capacity: Competency-Based Training
- Introducing a New Language to Your Sales Process and Organization
- Missed Opportunity: Debriefing After Your Meeting
- Coaching Strategies vs. Telling Someone What to Do
- What to Do When Advisors Become Defensive
- Managing and Coaching Millennials and Young Advisors
- The Common Denominator of Failure: Slow Erosion of the Fundamentals
- Field Tested: The Importance of Expecting More from People
- Coaching How to Lead by Example
- Training & Facilitation Best Practices
- Keys to Professional Growth & Designations
- Becoming an Effective Coach
- Activity Coaching vs. Mentoring
- Communication: Giving and Receiving Feedback
- Coaching vs. Cheerleading

THE SCIENCE - THE DEVELOPMENT PROCESS - INEXPERIENCED ASSOCIATES

- Hiring to the Proper Mindset of Inexperienced Candidates
- Creating A Development Strategy for Your Associates - Part One
- Creating A Development Strategy for Your Associates - Part Two
- Benefits of Pre-Sales Game Planning
- Show Me – Planning a Sales Call
- Debriefing After a Sales Call
- Show Me - Debriefing After a Sales Call

THE ART - THE DEVELOPMENT PROCESS - INEXPERIENCED ASSOCIATES

THE SCIENCE - THE DEVELOPMENT PROCESS - EXPERIENCED ASSOCIATES

- Why Big Producers Seek Coaching
- Leading Others Out of Complacency
- Creating a Personal Development Plan – Part One
- Creating a Personal Development Plan – Part Two
- Leading the Detached Producer – Part One
- Leading the Detached Producer – Part Two
- The Importance of Recurring Revenue to Your Associates

THE ART - THE DEVELOPMENT PROCESS - EXPERIENCED ASSOCIATES

- Coaching Tactics to Help Advisors Move to the Next Level
- Leveraging Your Company Values as an Accountability Tool
- Coaching: The Bridge Between Leadership and Entrepreneurship
- Goethe's Creed: Expecting the Best in People
- Recruiting is Hard, but Retention is Harder: Listen to Your People
- Know Your People: Find Out Who They Really Are
- Know Your People: Using Soft Skills in Leadership
- Keys to Building a High-Expectation Culture
- Creating a Culture of Expectations

THE SCIENCE - THE DEVELOPMENT PROCESS - PRODUCTION GROWTH

UNDERSTANDING THE ADVANTAGES OF MENTORING SERIES

- Overview of Mentoring
- Benefits of Mentoring
- Benefits of Reverse Mentoring
- How an Agency Can Support Mentoring
- Roles & Responsibilities of the Mentor - Part One
- Roles & Responsibilities of the Mentor - Part Two
- Roles & Responsibilities of the Mentee - Part One
- Roles & Responsibilities of the Mentee - Part Two
- Benefits of Pre-Sales Game Planning
- Show Me – Planning a Sales Call
- Debriefing After a Sales Call
- Show Me - Debriefing After a Sales Call
- How to Structure Study Groups
- The Value of Study Groups for Experienced Agents and Advisors
- The Structure of a Study Group - Roles and Responsibilities
- Focus Groups - Growing our Mid-Tier Associates
- Designing Effective Sales Contests – Part One
- Designing Effective Sales Contests – Part Two
- Benefits of Joint Field Work
- Benefits of Working on Teams

THE ART - THE DEVELOPMENT PROCESS - PRODUCTION GROWTH

- Setting Expectations to Drive Behavior
- Coaching Advisors on What They Can Control & Influence
- Helping Advisors Focus on What Matters to their Business
- Turnkey Approach to Agency Building
- Retaining Good People with Formal Mentorship Programs
- Using the 10-10-10 Model: Helping Advisor's Make Big Decisions
- Five Disciplines of Execution & High Performance
- An Overview of the Performance 90 System
- The Role of the Performance 90 Coach
- The Objective of Performance 90 System

THE SCIENCE - THE DEVELOPMENT PROCESS - ONGOING TRAINING & DEVELOPMENT

TEAM BUILDING SERIES

- Why You Want to Build Selling Teams
- Different Team Structures
- Building Effective Teams – Part One
- Building Effective Teams – Part Two

CROSS SELLING OPPORTUNITIES

- Regulatory Headwinds Will Force Change
- Getting Associates Back Selling Protection Products
- Planning Opportunities for Annuity Holders
- Good Fact-Finding for Cross-Selling
- Cross Selling Protection Products - Part One
- Cross Selling Protection Products - Part Two
- Cross Selling Protection Products - Part Three
- Cross Selling Protection Products - Part Four
- Millennials and Baby Boomers Serving Each Other

UNDERWRITING BEST PRACTICES

- How a Cover Letter Helps in Underwriting
- The Basics of Reinsurance
- Underwriting Best Practices

THE ART - THE DEVELOPMENT PROCESS - ONGOING TRAINING & DEVELOPMENT

- Key Principles of Teaming
- Five Steps to Launching a Team
- Teaming: Structure, Roles & Responsibility
- Clients & The Delegation of Client Relationships Build Great Teams
- Teaming: Compensation Models
- Teaming: The Role of the Manager
- Why Team Selling?
- Managing and Structuring High Performance Teams

THE SCIENCE - THE DEVELOPMENT PROCESS - BUILDING MARKETS

- Teaching Your Associates How to Target Market
- Deploying Associates into Markets
- Event Based Training
- Marketing Through Client Events
- How to Use Newsletters to Grow Your Associate's Business

THE ART - THE DEVELOPMENT PROCESS - BUILDING MARKETS

THE SCIENCE - THE DEVELOPMENT PROCESS - STAFF, FUNCTIONAL SPECIALISTS AND CONTINGENCY PLANNING

- How to Hire Great Staff – Part One
- How to Hire Great Staff – Part Two
- How to Write a Job Description
- What Not to Ask During an Interview
- Funding an Administrative Assistant
- How to Terminate an Employee – Part One
- How to Terminate an Employee – Part Two
- Building a Team of Specialist on a Budget
- Hiring Interns
- How Marketing Underwriters Add Value – Part One
- How Marketing Underwriters Add Value – Part Two
- Holding a Specialist Accountable
- Show Me - Keeping a Specialist Accountable

THE ART - THE DEVELOPMENT PROCESS - STAFF, FUNCTIONAL SPECIALISTS AND CONTINGENCY PLANNING

THE SCIENCE - THE DEVELOPMENT PROCESS - MANAGEMENT TEAMS

- Creating A Development Strategy for Your Leaders - Part One
- Creating A Development Strategy for Your Leaders - Part Two
- Helping an Associate Transition into Management
- Why Frontline Managers Are Not More Productive – Part One
- Why Frontline Managers Are Not More Productive – Part Two

THE ART - THE DEVELOPMENT PROCESS - MANAGEMENT TEAMS

THE ACCOUNTABILITY PROCESS

THE SCIENCE - THE ACCOUNTABILITY PROCESS - GENERAL

- Why Accountability Can Break Down
- How to Have the Hard Conversation
- Conducting Virtual Accountability Meetings
- Terminating or Coaching Marginal Performers - Part One
- Terminating or Coaching Marginal Performers - Part Two
- When It Is Time to Terminate Someone
- How to Terminate Someone

THE ART - THE ACCOUNTABILITY PROCESS - GENERAL

THE SCIENCE - THE ACCOUNTABILITY PROCESS - THE POWER OF GOALS

- The Importance of Goal Setting
- Three Secrets to Effective Goal Setting
- Two Sets of Goals – Part One
- Two Sets of Goals – Part Two
- Importance of Incorporating Core Values into Goals
- Leading Your Associates with SMART Goals

THE ART - THE ACCOUNTABILITY PROCESS - THE POWER OF GOALS

THE SCIENCE - THE ACCOUNTABILITY PROCESS - ACTIVITY MONITORING

ACTIVITY MONITORING – INEXPERIENCED

- 5 Key Performance Indicators to Production Growth
- Having a GAP Analysis Conversation with New or Under Performing Associates
- Show Me - GAP Analysis with New Associates
- Show Me – COP Activity – New Associate Not on Plan
- Show Me – COP Talk for Accountability – 2nd Year Associate Not on Plan

ACTIVITY MONITORING – EXPERIENCED

- Why Independent Associates May Not Be Hitting Their Goals
- Show Me – Coaching Accountability - Experienced Associate Not on Plan
- What Happens When an Associate's Business Plateaus – Part One
- What Happens When an Associate's Business Plateaus – Part Two
- GAP Conversation with Promotable or Under-Performing Associate or Staff Member
- How to Have a Coaching Conversation
- Show Me – How to Have a Coaching Conversation
- Show Me – How to Have a Consulting Conversation

SELF-DISCIPLINE AND AWARENESS

- A Leader's Self-Discipline
- The Self-Disciplines to be a Transformational Leader
- Self-Awareness of a Leader
- Keys to Self-Accountability

STAFF AND FUNCTIONAL SPECIALIST

- Holding Staff Members Accountable
- The Value of Daily Team Briefings
- Holding a Specialist Accountable
- Show Me - Keeping a Specialist Accountable

THE PERSONAL DEVELOPMENT PROGRAM

- Creating a Personal Development Plan – Part One
- Creating a Personal Development Plan – Part Two

MANAGEMENT TEAM

- Why Managers Do Not Hold Others Accountable
- Holding a Field Leader Accountable

- Show Me - Keeping a Sales Leader Accountable
- Accountability Meeting When Goals Are Not Met
- Show Me - Accountability Meeting When Goals are Not Met

THE ART - THE ACCOUNTABILITY PROCESS - ACTIVITY MONITORING

- LAMP Main Platform: Expectations, Impact & Accountability
- The Expectations Matrix
- Accountability: Ownership vs. Consequences

THE ALTERNATIVE DISTRIBUTION PROCESS

- The Alternative Distribution Process - General

THE SCIENCE - THE ALTERNATIVE DISTRIBUTION PROCESS - BANKING

- Approaching Large Banks to Sell Insurance
- The Structure of Larger Banks
- The Transactional Nature of Large Banks
- The Extra Service Needs for Banks
- Working with Community Banks
- How to Approach a Community Bank
- Your Value Proposition for a Community Bank
- Understanding the Concerns of Smaller Banks
- Obstacles to Doing Business in a Community Bank
- Selecting a Representative for a Community Bank – Part One
- Selecting a Representative for a Community Bank – Part Two
- Developing Referrals and Prospects Within a Bank
- Lead Flow and Accountability in the Banks
- Specialist Access That Banks Will Need

THE ART - THE ALTERNATIVE DISTRIBUTION PROCESS - BANKING

THE SCIENCE - THE ALTERNATIVE DISTRIBUTION PROCESS - MULTI-LINE FIRMS

- Overview of Life Opportunities in a Multiple-Line Firm
- Future Disruption in Multiple-Line Markets
- Building A Sales Culture in a Multiple-Line Agency
- Why Multiple-Line Firms Should Cross-Sell

- How to Cross Sell in a Multiple-Line Firm
- Various Ways a Multiple-Line Firm May Build Life Business – Part One
- Various Ways a Multiple-Line Firm May Build Life Business – Part Two

THE ART - THE ALTERNATIVE DISTRIBUTION PROCESS - MULTI-LINE FIRMS

THE SCIENCE - THE ALTERNATIVE DISTRIBUTION PROCESS - WHOLESALER

- How the Life Insurance Wholesaler Needs to Adapt
- The Demise of the Steak and Whiskey Wholesaler
- Headwinds That Will Impact Brokerage Firms
- How Brokerage Firms Can Adapt to Headwinds
- Pros and Cons of Independent Brokerage Distribution
- Regulatory Headwinds Will Force Change
- Changing Demographics Will Require Visionary Leadership – Part One
- Changing Demographics Will Require Visionary Leadership – Part Two
- Wholesaling Best Practices
- Utilizing an Agenda
- Relationship Building Keys for Wholesalers
- Wholesaling to the Independent PPGA
- Qualifying a Producer to See If They Are a Brokerage Prospect – Part One
- Qualifying a Producer to See If They Are a Brokerage Prospect – Part Two
- How to Approach a Career Agent to Broker
- Little Things that are Costing Business
- How Marketing Underwriters Add Value – Part One
- How Marketing Underwriters Add Value – Part Two
- Topics Not to Discuss in Business

THE ART - THE ALTERNATIVE DISTRIBUTION PROCESS - WHOLESALER

CLASSICS

THE SCIENCE - CLASSICS

- Positioning Your Brand For Recruitment

THE ART - CLASSICS

- Recruiting: Distinguish by How, Not What
- Recruiting & Selection: A Legend's Perspective
- Developing a Recruiting & Selection Culture
- Keys to Recruiting, Selection & Retention
- LAMP Main Platform: Recruiting and Selection
- REPS Recruiting System Insight
- Keys to Successful Recruiting
- Master Agency Insights: Recruiting, Selection, Productivity and Retention
- Presenting a Realistic View of the Career
- Traits to Identify in the Selection Process
- Creating a High Performance Culture
- Retention & Productivity: A Legend's Perspective
- Developing a Culture of Accountability & High Expectations
- Managing Successful Sales Teams
- The Stanford Pyramid: Creators, Orchestrators and Executors
- ALPS Leadership Principles for Success (Part 1)
- ALPS Leadership Principles for Success (Part 2)
- Leadership Development: A Legend's Perspective
- Leadership Insights from the Hall of Fame
- Lessons from a GAMA Hall of Fame Member
- Building a Hall of Fame Organization
- Master Agency Insights: Recruiting, Selection, Productivity & Retention
- Connecting through Leadership
- Four Questions Leaders Should Ask Themselves
- The Two B's + Four C's of Leadership
- Six Critical but Often Forgotten Aspects of Leadership
- Developing a High-Performance Culture
- Advice for New Field Leaders