

# CIC Agency Leadership Institute (ALI)

## Class 5 / March and June, 2020



### Session One (March TBD, 2020)

#### Day 1

|                |                              |             |   |
|----------------|------------------------------|-------------|---|
| 4:00 - 4:45 pm | Welcome and Program Overview | Bobby/Steve | Introduce BPS, OGP, Use of Data and Metrics |
| 4:45 - 6:30 pm | Generational Issues          | Elmore      | With Break-Out from 6:00-6:30               |
| 6:30 - 9:30 pm | <i>Cocktails and Dinner</i>  |             |   |

#### Day 2

|                  |   |          |  |
|------------------|---|----------|--|
| 8:00 - 9:55 am   | Recruiting, Training, Leading Next Generation | Kevin    | With Break-Out from 9:00-9:40, Group Sharing 9:40-9:55     |
| 9:55 - 10:10 am  | <i>Break</i>                                  |          |  |
| 10:10 - 12:00 pm | High Performance Cultures                     | Scott    | With Break-Out from 11:00-11:45, Group Sharing 11:45-12:00 |
| 12:00 - 1:00 pm  | <i>Lunch Break</i>                            |          |  |
| 1:00 - 2:25 pm   | Value Creation - Managing Profitability       | Bobby    | With Break-Out from 1:45-2:10, Group Sharing 2:10-2:25     |
| 2:25 - 2:35 pm   | <i>Break</i>                                  |          |  |
| 2:35 - 4:00 pm   | Value Creation - Managing Growth              | Kevin    | With Break-Out from 3:20-3:45, Group Sharing 3:45-4:00     |
| 4:00 - 5:00 pm   | Leveraging Performance Metrics                | Harrison | Game - Building Mgt Dashboard                              |
| 5:00 - 5:30 pm   | <i>Break</i>                                  |          |  |
| 5:30 - 8:30 pm   | <i>Cocktails and Dinner</i>                   |          |  |

#### Day 3

|                  |   |                   |                                       |
|------------------|---|-------------------|---------------------------------------|
| 8:00 - 9:30 pm   | Importance of Sales Leadership/SLI/Responsibilities | Scott             | Open Discussion Instead of Break-Outs |
| 9:30 - 10:10 pm  | Change Management - Planning/Execution              | Bobby             |                                       |
| 10:10 - 10:20 pm | <i>Break</i>  |                   |                                       |
| 10:20 - 10:50 pm | Personal Reflection                                 |                   |                                       |
| 10:50 - 11:20 pm | Break-Outs Sharing Issues and Priorities            |                   |                                       |
| 11:20 - 11:45 pm | Wrap Up   | Bobby/Scott/Steve |                                       |

### Session Two (June TBD, 2020)

#### Day 1

|                |  |             |  |
|----------------|--|-------------|--|
| 4:00 - 4:45 pm | Welcome - Future Opportunities and Challenges for Agents   | Kevin/Steve |  |
| 4:45 - 6:30 pm | Sales Leadership/Sales Playbook Concept/Discipline 1 -Why! | Scott       | With Break-Out from 5:50-6:15, Group Sharing 6:15-6:30 |
| 6:30 - 9:30 pm | <i>Cocktails and Dinner</i>                                |             |  |

#### Day 2

|                  |  |                    |  |
|------------------|--|--------------------|--|
| 8:00 - 9:55 am   | Discipline 2 - Customer Experience Journey     | Scott              | With Break-Out from 9:00-9:40, Group Sharing 9:40-9:55     |
| 9:55 - 10:10 am  | <i>Break</i>                                   |                    |  |
| 10:10 - 12:00 pm | Discipline 3 - Prospect Strategy Map           | Scott (w/Harrison) | With Break-Out from 11:00-11:45, Group Sharing 11:45-12:00 |
| 12:00 - 1:00 pm  | <i>Lunch Break</i>                             |                    |  |
| 1:00 - 2:25 pm   | Perpetuation and Growth Strategies             | Reagan Team        | Open Discussion Instead of Break-Outs                      |
| 2:25 - 2:35 pm   | <i>Break</i>                                   |                    |  |
| 2:35 - 3:50 pm   | Discipline 4 - Consultative Sales              | Scott              | With Break-Out from 3:10-3:40, Group Sharing 3:40-3:50     |
| 3:50 - 5:00 pm   | Discipline 5 - Benchmarking and Accountability | Scott              | With Break-Out from 4:25-4:45, Group Sharing 4:45-5:00     |
| 5:00 - 5:30 pm   | <i>Break</i>                                   |                    |  |
| 5:30 - 8:30 pm   | <i>Cocktails and Dinner</i>                    |                    |  |

#### Day 3

|                  |  |                        |   |
|------------------|--|------------------------|---|
| 8:00 - 10:10 am  | Brand Differentiation and Panel Innovation | Mark<br>Wendi Bukowitz | With Break-Out from 9:30-9:50, Group Sharing 9:50-10:10 |
| 10:10 - 10:20 am | <i>Break</i>                               |                        |   |
| 10:20 - 10:50 am | Personal Reflection                        |                        |   |
| 10:50 - 11:20 am | Break-Outs Sharing Issues and Priorities   |                        |   |
| 11:20 - 11:45 am | Wrap Up                                    | Bobby/Scott/Steve      |   |