

# Professional Agency Managers Programme

Level 1



26 Prime Skills  
13 Power Skills  
Proficiency Level: Intermediate

21 CPD HOURS

## PROGRAMME OVERVIEW

In the dynamic landscape of the insurance and financial services industry, effective leadership is paramount for organizational success. To address this critical need, agency managers need to be equipped and empowered with the essential knowledge, skills, and strategies required to lead high-performing teams.

This program aims to inspire visionary leadership by fostering a forward-thinking vision among participants, and to help participants overcome barriers and drive change within their organizations. It provides a transformative opportunity for aspiring agency managers to enhance their leadership capabilities, inspire innovation, and drive future-ready talents and organizational success in the insurance and financial services industry.

## THE PROFESSIONAL AGENCY MANAGER PROGRAMME WILL

### **Empower Tomorrow's Leaders**

Gain essential knowledge, skills, and strategies to lead high-performing teams.

### **Cultivate Visionary Leadership for Sustainable Growth:**

Guide leaders to develop forward-thinking visions for sustained growth and success.

### **Learn from Industry Experts:**

Gain practical insights from industry experts through interactive exercises and real-world case studies to lead multi-generational teams.

### **Overcome Barriers and Drive Change:**

Identify and overcome obstacles and adapt to new management approaches to foster progress.

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## PROGRAMME HIGHLIGHTS



### Strategic Leadership

Build skills to navigate market trends and align business objectives with vision.



### Visionary Planning

Develop impactful business plans with customer segmentation and market insights.



### Goal Setting & Accountability

Implement SMART goals to drive team performance and accountability.



### Agent Productivity

Boost agent engagement and performance through MAPA strategies.



### Recruitment & Coaching

Master talent acquisition, coaching, and self-leadership for high-performance teams.

## TARGET AUDIENCE

- Agents moving from individual contributor to team supervisors / unit managers.
  - Agency leaders preparing for promotion to agency managers.
  - Direct appointed team leaders.
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## PROGRAMME MODULES

Programme length: 3-days Programme.

### 01 Strategic Thinking

- Understanding Current Market Trends
- Assessing Regulatory Changes
- Conducting SWOT Analysis
- Defining Strategic Objectives
- Aligning with Vision and Mission

### 02 Vision Casting

- Designing a Compelling Vision
- Aligning Vision with Objectives
- Leading by Example (Role Differentiation)

### 03 Business Planning

- Introduction to Business Planning
- Defining Business Goals
- Market Analysis and Customer Segmentation
- Establishing WIGs (Wildly Important Goals)
- Monitoring, Review, and Adaptation

### 04 Goal Setting

- SMART Goal Framework
- Segmentation and Prioritization
- Aligning Individual & Team Goals
- Goal Communication & Accountability
- Min. Standard & High Expectation

### 05 Managing MAPA

- Understanding MAPA
  - Maximizing Agent Engagement
  - Enhancing Agent Productivity
  - Monitoring & Analyzing MAPA Trends
  - Navigating Selection Process
  - Implementing Secondary Selection
  - Retention & Referrals Strategies
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## PROGRAMME MODULES

### 06 Recruiting & Selection

- Understanding Fundamentals
- Defining Ideal Candidate Profile
- Innovative Recruitment Approaches
- Future Trend - Recruitment the Digital Way
- Navigating Selection Process
- Implementing Secondary Selection
- Retention & Referrals Strategies

### 07 Training

- Understanding Job Performance Model
- Constructing Segmentized Agent Development Plans
- Establishing Learning Organization
- Accountability Groups
- Monitoring & Motivating Agents
- Example: Training Calendar / Agent Development Plan Template

### 08 Coaching

- Mentoring vs Coaching
- Roles of Manager as a Coach
- Fundamental of Effective Sales Coaching
- Thematic Coaching for Sales Performance
- Developing High Performance Culture
- Example: Coaching Conversation Framework

### 09 Leadership Development

- Leader's Self-Assessment (Leadership Vitality)
  - Developing Strengths, Managing Weaknesses
  - Determining Professional Priorities (End in mind "Successful MAPA")
  - Cultivating an Environment for Success & Enhancing Communication Skills
  - Example: Leadership Competencies Assessment/ Professional Priorities Matrix
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## MASTER TRAINER



**Kelly Ho Joo Suan**  
Master Trainer, COT, UM,  
AQBA Qualifier

**Kelly Ho Joo Suan** is a true leader in the insurance industry. As a Master Trainer and a member of the prestigious Million Dollar Round Table (MDRT), Kelly has consistently demonstrated her excellence, guiding her team to success with unmatched passion and commitment. She has been recognized with multiple awards, including the Nationwide Top 3 MDRT Builder, AIA Group MDRT Ambassador, Top Achiever for Vitality Nationwide, and an AQBA qualifier. Her expertise extends far beyond just business success - she is also a certified coach and trainer, equipping the next generation of leaders with the tools to thrive in an ever-evolving industry. With a career filled with accolades and a drive to empower others, Kelly exemplifies the true spirit of excellence, resilience, and mentorship.



**Kent Yap Kien Lee**  
Master Trainer,  
AQBA Qualifier

**Kent Yap Kien Lee** is a powerhouse of determination and achievement. He is an Executive Master Trainer and District Manager, who has consistently set new standards of excellence in the insurance industry. With multiple Million Dollar Agency awards and numerous accolades, including Top District Manager, MDRT Top of the Table Qualifier and AQBA Qualifier, Kent has demonstrated that success is built on unwavering commitment and passion for helping others. He is not only a remarkable leader but also a dedicated mentor who empowers others to reach their full potential. Kent's leadership and vision have made a profound impact, earning him the respect of his peers and the admiration of those he coaches.



**Albert Pua**  
District Manager,  
AQBA Qualifier  
Million Dollar Agency  
Builder

**Albert Pua** is a visionary leader and trailblazer in the insurance industry. As a District Manager, a Million Dollar Agency Builder since 2011 and AQBA Qualifier, Albert has demonstrated exceptional leadership, consistently driving success across his teams. His passion for motivation, recruitment, and breakthrough strategies has not only earned him the title of National Champion but also the recognition as an MDRT Coach and Chartered Insurance Agency Manager. Albert has also had the privilege of inspiring audiences across Thailand, Singapore, and Indonesia as a guest speaker. With over 45 countries' worth of experience under his belt, Albert continues to groom the next generation of leaders with his 'make it right, make it happen' philosophy.

## ALIGNMENT TO THE FUTURE SKILLS FRAMEWORK



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### Skills Developed by Attending this Programme

#### Prime Skills

Customer Experience Management	<ol style="list-style-type: none"> <li>1. Account Management</li> <li>2. Customer Acquisition and Retention Management</li> <li>3. Customer Experiential Design</li> </ol>	<ol style="list-style-type: none"> <li>4. Customer Profiling</li> <li>5. Customer Relationship Management</li> <li>6. Customer Screening and Onboarding</li> </ol>
Financial Products and Services	<ol style="list-style-type: none"> <li>1. Marketing</li> <li>2. Personal Finance Advisory</li> <li>3. Product Advisory</li> </ol>	<ol style="list-style-type: none"> <li>4. Quality Assurance</li> <li>5. Sales Strategy</li> <li>6. Sales Target Management</li> </ol>
Growth & Partnerships	<ol style="list-style-type: none"> <li>1. Business Opportunities Development</li> <li>2. Business Performance Management</li> <li>3. Business Planning and Needs Analysis</li> </ol>	
Investment and Financial Management	<ol style="list-style-type: none"> <li>1. Insurance Claims Processing</li> </ol>	
People Management & Development	<ol style="list-style-type: none"> <li>1. Employee Engagement Management</li> <li>2. Employee Experience Design</li> <li>3. Employee Performance Management</li> <li>4. Employer Branding</li> <li>5. Organisation Culture Development</li> </ol>	<ol style="list-style-type: none"> <li>6. Industrial Relations</li> <li>7. Learning Management</li> <li>8. Onboarding and Offboarding</li> <li>9. Succession Planning</li> <li>10. Talent Acquisition and Recruitment</li> </ol>

#### Power Skills

Innovation & Delivery	<ol style="list-style-type: none"> <li>1. Adaptability and Resiliency</li> <li>2. Business Acumen</li> <li>3. Change Management</li> <li>4. Critical Thinking</li> </ol>	<ol style="list-style-type: none"> <li>5. Innovative Thinking</li> <li>6. Learning Agility</li> <li>7. Problem Solving</li> </ol>
Social Intelligence	<ol style="list-style-type: none"> <li>1. Coaching &amp; Mentoring</li> <li>2. Collaboration</li> <li>3. Communication</li> </ol>	<ol style="list-style-type: none"> <li>4. Conflict Management</li> <li>5. Empathy</li> <li>6. Influencing and Negotiation</li> </ol>

## REGISTRATION FEE

**Member**  
**RM 2,800.00**

**Non - Member**  
**RM 3,000.00**

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(Formaly known as Malaysia Insurance Institute)

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