

# Professional Agency Management Programme

**4 DAYS PROGRAMME**

**TRAINING MODE:**

Face to face (F2F) or Virtual

**28 CPD HOURS**

**Proficiency Level:** Intermediate



26 Prime Skills

13 Power Skills

# PROGRAMME OVERVIEW

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

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

## Programme Objectives

### **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.

# PROGRAMME HIGHLIGHT



## **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.



## **Recruitment & Coaching**

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



## **Advisor Productivity**

Boost advisor engagement and performance through MAPA strategies.

## TARGET AUDIENCE

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

## PROGRAMME FEE

In-House Programme

Maximum 20 pax per session

– RM60,000

Additional Participants

– RM2,800 per pax

# PROGRAMME CONTENT

## **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 Prioritisation
- Aligning Individual & Team Goals
- Goal Communication & Accountability
- Minimum Standard & High Expectation

## **05 Managing MAPA**

- Understanding MAPA
- Maximising Advisor Engagement
- Enhancing Advisor Productivity
- Monitoring & Analysing MAPA Trends
- Navigating Selection Process
- Implementing Secondary Selection
- Retention & Referrals Strategies

# PROGRAMME CONTENT

## **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 Segmentised Advisor Development Plans
- Establishing Learning Organisation
- Accountability Groups
- Monitoring & Motivating Advisors
- Example: Training Calendar / Advisor 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

# SPEAKER PROFILE



**Andy Tang**, with over 30 years of experience in financial services management, is a visionary leader in wealth protection, business succession, and financial literacy. He is a seasoned expert in personal and business wealth management, specializing in wealth protection, accumulation, and distribution.

His vast experience includes cash flow, debt, and liability management, as well as talent retention and business succession planning.

He has trained ING's trainers and regional managers on effective closing techniques and provided exclusive leadership training to Etiqa's agency managers. A sought-after speaker, Andy has shared his insights across Asia, including AIA in Bangkok and major platforms in Beijing, Guangzhou, and Hong Kong.

Through his efforts, Andy has successfully developed exceptional managers and leaders who now serve communities nationwide, demonstrating his enduring impact on the financial services industry.



**Ivon Lee**, a highly skilled leader with over two decades of experience, is a driving force in leadership development and agency management within the insurance industry. Her expertise spans leadership, agency development, personal development, soft skills, and sales training.

She applies the 6 Disciplines of Breakthrough Learning to design and develop programmes, producing over 10 major leadership initiatives that drive quality recruitment, business sustainability, and high-performance culture at AIA.

As a Faculty Head, she collaborates closely with Sales Heads to translate business strategies into effective training programs. Her ability to balance business targets with training effectiveness and communication needs has earned her the trust of AIA's Chief Agency Distribution Officer to lead key people development projects.

# FSF SKILLS



26 Prime Skills

13 Power Skills

Proficiency Level: Intermediate

## Skills Developed by Attending this Programme

### Prime Skills

Customer Experience Management	1. Account Management 2. Customer Acquisition and Retention Management 3. Customer Experiential Design	4. Customer Profiling 5. Customer Relationship Management 6. Customer Screening and Onboarding
Financial Products and Services	1. Marketing 2. Personal Finance Advisory 3. Product Advisory	4. Quality Assurance 5. Sales Strategy 6. Sales Target Management
Growth & Partnerships	1. Business Opportunities Development 2. Business Performance Management 3. Business Planning and Needs Analysis	
Investment and Financial Management	1. Insurance Claims Processing	
People Management & Development	1. Employee Engagement Management 2. Employee Experience Design 3. Employee Performance Management 4. Employer Branding 5. Organisation Culture Development	6. Industrial Relations 7. Learning Management 8. Onboarding and Offboarding 9. Succession Planning 10. Talent Acquisition and Recruitment

### Power Skills

Innovation & Delivery	1. Adaptability and Resiliency 2. Business Acumen 3. Change Management 4. Critical Thinking	5. Innovative Thinking 6. Learning Agility 7. Problem Solving
Social Intelligence	1. Coaching & Mentoring 2. Collaboration 3. Communication	4. Conflict Management 5. Empathy 6. Influencing and Negotiation



# REGISTER NOW



## **Asian Institute of Insurance**

197701004772 (35445-H),  
Level 6, Bangunan AICB,  
No. 10 Jalan Dato' Onn,  
50480 Kuala Lumpur, Malaysia

For further information, please contact:  
Email: [sales@aiaasia.org](mailto:sales@aiaasia.org)

[www.aiaasia.org](http://www.aiaasia.org)  
[@aiaasiaorg](https://www.aiaasia.org)