



AIAM
CIAM

hosted by



in collaboration with



Associate Insurance Agency Manager (AIAM)
Chartered Insurance Agency Manager (CIAM)

Associate Insurance Agency Manager Designation

LIMRA created the **Associate Insurance Agency Manager (AIAM)** designation to help individuals make a successful transition from sales to management and to prepare and train agency managers in the skills demanded by their mission-critical role of finding and developing new sales talent.

Participants who earn the AIAM Designation are able to:

- Assess the alignment of their skills with the expectations of the sales manager position
- Acquire the basic knowledge and skills to become successful sales managers
- Learn foundational recruiting, career presentation, and initial agent training techniques
- Deepen and master core skills needed to succeed as a sales manager

By earning the prestigious AIAM designation, your sales agents and new managers can enhance their knowledge, improve their performance, and demonstrate their professional commitment to ongoing skills development.

How Do I Earn the AIAM Designation?

Over the course of two years, the candidate must complete two courses to demonstrate proficiency: **Fast Track to Management™** and **Pacesetter**.



Fast Track to Management



Pacesetter



Step 1:

Fast Track to Management (FT2M)

The Fast Track to Management program is designed to help attendees make the transition from sales agent to pre-manager or management.

Recruitment challenges faced today include low retention rates and less than adequate talent pools – with proven strategies and skills for laying a foundation for new manager success, FT2M will lay the foundation to help agents transition into management, build critical skills to motivate and develop their sales agents, resulting in greater productivity.

This program consists of four modules (2 Days / 4 Virtual Sessions):

- Foundational Knowledge & techniques for finding potential agents, positioning the career & on-boarding new agents
 1. Seeing the Opportunity – Shift in mindset to embrace new role
 2. Selling the Opportunity – Top techniques for sourcing agents presenting the career
- Focusing on your Market & Needs
 1. Developing Sales Skills in Your New Agents
 2. Supporting Your Agent Prospecting Success

Key Features & Benefits

Targeted Business Outcomes:

- ✓ Align personal motivational values with company career opportunities.
- ✓ Implement foundational sales management skills (e.g., setting goals).
- ✓ Develop a 90-day plan for a smooth transition into management.

Selling the Opportunity:

- ✓ Build a candidate pipeline from close sources.
- ✓ Master networking practices and candidate motivation strategies.
- ✓ Craft compelling scripts and manage objections to secure candidates' commitment.

Developing Sales Skills in Agents:

- ✓ Identify training opportunities and deliver impactful training events.
- ✓ Apply the PESOS model to help new agents improve sales skills.



Step 2: Pacesetter

While Sales Manager's core functions have not changed, the world around them has.

Pacesetter embraces these changes with an all-new program that gives your first-year managers and Trainee Managers today's best practices in 5 days:



Day 1: Planning & Goal Setting



Day 2: Recruiting & Selection



Day 3: Agent Development



Day 4: Managing Performance

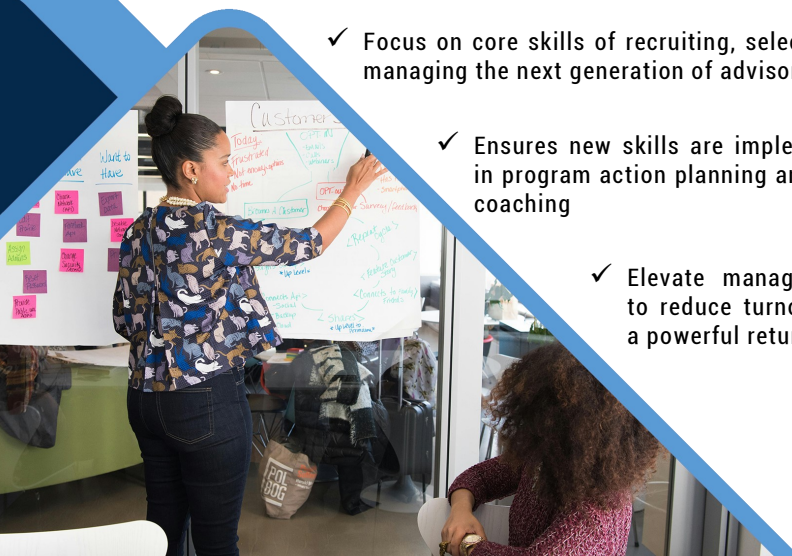


Day 5: Bringing it all together - participants Present their Unit Action Plan, Analysis of Management Process and Action Plans as well as dive into the details for the Post-Seminar Project.

Benefits

Pacesetter helps your new managers perform core elements of their job at a higher level than ever:

- ✓ The popular Anytown Agency Simulation provides participants the opportunity to run an agency for three years in three hours, allowing them to see how key decisions impact the agency, resulting in enhanced planning and strategizing, decision making, and team building skills.)
- ✓ Enhances understanding of core skills through experiential exercises
- ✓ Focus on core skills of recruiting, selecting, training & managing the next generation of advisors
- ✓ Ensures new skills are implemented through in program action planning and post program coaching
- ✓ Elevate manager performance to reduce turnover and deliver a powerful return in investment



Chartered Insurance Agency Manager Designation

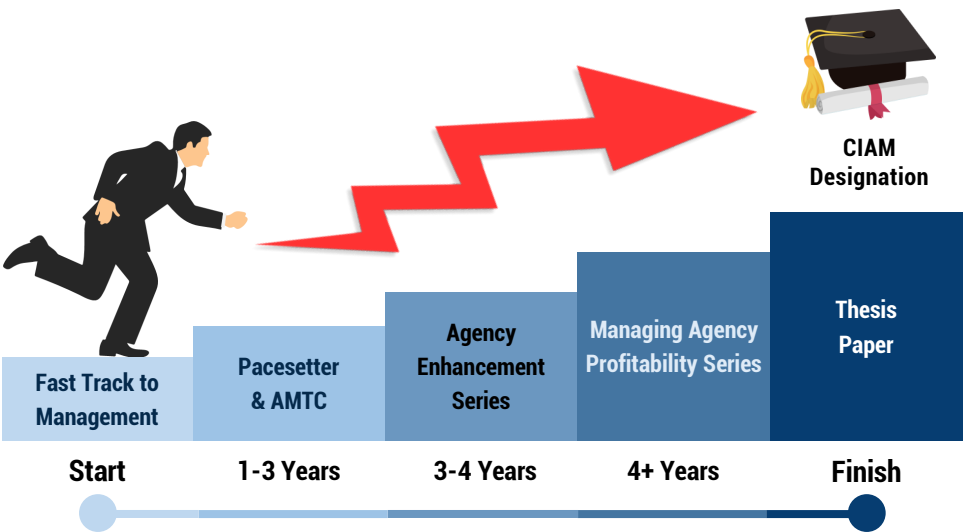
The **Chartered Insurance Agency Manager (CIAM)** designation is the mark of professionalism, competence, and modern leadership in today's insurance marketplace. Today, as never before, field managers must be fully equipped to meet the challenging demands of their role as leaders in the distribution of life insurance and financial services.

LIMRA created the CIAM designation to provide a track for professional development and a benchmark by which the manager can be measured and recognized. The candidate for CIAM makes a personal commitment to growth and development as a field manager. Since CIAM is international in scope, the curriculum for each step reflects the unique stages of industry development in countries all over the world.

How Do I Qualify for the CIAM Designation?

You must complete the following four courses, in addition to a final thesis to demonstrate proficiency:

- ✓ **Pacesetter**
- ✓ **Agency Management Training Course (AMTC)**
- ✓ **Agency Enhancement Series (AES)**
- ✓ **Managing Agency Profitability Seminar (MAPS)**



Recommended Managerial Experience & Timeline

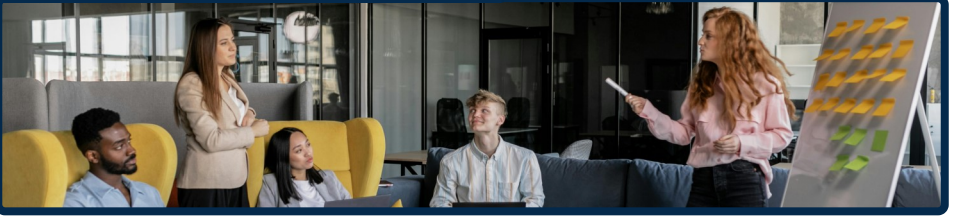
** Fast Track to Management is not required to attain the CIAM Designation but is required to attain the AIAM designation.



Step 3:

Agency Management Training Course (AMTC)

Unlock Your Leadership Potential



Designed for sales managers stepping into leadership, agency heads, and functional managers, LIMRA's AMTC is your gateway to mastering 28 essential management skills, including planning, recruitment, training, and performance management. Whether you're seeking a performance boost or fresh insights, AMTC equips graduates to drive agency success with measurable results in agent retention, new premium generation, and recruitment.

Now revamped with updated research, enriched resources, and engaging digital materials, AMTC offers user-friendly navigation and practical tools for real-world impact.

Key Modules:

- **Planning:** Develop agency culture, mission, and annual plans. Guide agents in performance reviews and goal setting.
- **Recruiting:** Build a strong pipeline using agent referrals, warm leads, and other innovative methods.
- **Selection:** Reduce turnover with proven selection techniques, including job-sampling for top recruits.
- **Training:** Implement training techniques that drive behavioral change, utilizing agency events for skill development.
- **Performance Management:** Strengthen supervisory skills, manage agent activities, and enhance performance through tailored development plans.

The newly updated AMTC curriculum offers a complete course comprising 23 weekly sessions, each carefully planned to build upon the previous one, offering participants a progressive and immersive learning experience.

AMTC will be facilitated by a trained and certified LIMRA Moderator.



Step 4:

Agency Enhancement Series (AES)

The Agency Enhancement Series (AES) is designed for sales managers looking to elevate their leadership and drive team success. Through advanced strategies, AES equips managers with best practices to advance growth, enhance skills, and lead their sales agents to new levels of performance.

Three (3) One-Day Programs

Recruiting to and From Target Markets

- Identify key markets to position your recruitment opportunities.
- Source and approach top-quality candidates effectively.
- Select the best candidates from these markets.
- Seamlessly transition recruits into their new careers for long-term success.

Developing Your MDRT Agents

- Build a culture of excellence to create a team of Million Dollar Round Table (MDRT) producers.
- Set high-performance activity standards.
- Offering meaningful development opportunities for growth.
- Lead and inspire your MDRT agents to maintain top performance.

Building Your Business Through New Managers

- Understand the pivotal role of a sales manager in organizational growth.
- Identify and assess potential new managers.
- Equip new managers with the tools and knowledge for success.
- Effectively manage the performance of your new sales managers.





Step 5:

Managing Agency Profitability Seminar (MAPS)

Managing Agency Profitability Seminar (MAPS) is an accelerated learning experience that focuses on developing the skills agency managers need to drive long-term profitability and growth in today's hyper-competitive markets.

This 4½ Day course includes:

1. **Planning: Develop Pre-Seminar Activity:** builds a strong foundation of managing agency profitability through knowledge acquisition and reflection.
2. Level setting the fundamental knowledge necessary for playing the experiential simulation – **The Profit Engine (TPE)**
3. **TPE Simulation:** Working in teams to collaborate and successfully manage 12 quarterly rounds of agency profitability
4. **TPE Results and Board Presentations:** Reflecting on key findings and sharing recommendations and lessons learned

Overall, MAPS connects everyday decisions to bottom line results, promoting an understanding of how to balance the levers and drivers: selection and recruiting, training and development, sales and financial metrics and business management





About the Instructor

Michelle Havelock - RFC, MBA

**Senior Director, Member Relations and Development
Caribbean LIMRA Talent Solutions International**

Michelle Havelock is the Senior Director of Member Relations and Development for LIMRA and LOMA in the Caribbean. She holds the prestigious designations of Registered Financial Consultant (RFC) and a postgraduate degree in Business Administration (MBA).

With over three decades of experience in the financial services industry, Michelle has built a proven track record of success. Early in her career, she qualified for the coveted Million Dollar Round Table (MDRT), a testament to her exceptional skills and dedication. Her expertise in training and development has had a profound impact on many leaders and advisors throughout the Caribbean region.

Michelle's career journey is a testament to her versatility and determination. She transitioned from a banker to an insurance sales representative, and eventually to leadership roles in various fields such as Business Development, Recruitment, Selection, Learning & Development, and Customer Retention.

Training Experience

Michelle is a certified professional trainer, facilitator, and moderator. Michelle shares valuable insights and guidance on:

- Leadership and Team Building
- Recruitment & Selection
- Manpower & Business Retention
- Learning & Development
- Performance Management
- Strategic Business Management
- Networking and Relationship Building
- Innovation and Problem-Solving

ABOUT US:

Trinidad and Tobago Association of Insurance & Financial Advisors (TTAIFA) provides education for Insurance & Financial Advisors in Trinidad & Tobago.

Through a frame work of cooperation with LIMRA the Association has provided open enrollment program delivery and facilitation services.

TTAIFA is also in the process of introducing new relevant programmes all in the continuing process of better educating and certifying students.

**129-131 EDWARD STREET,
PORT OF SPAIN**



(868) 624-2940/624-2608



info@ttaifa.com



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