

# ABOUT IFPAS



Insurance and Financial Practitioners  
Association of Singapore  
Advancing professional excellence since 1978

## INSURANCE AND FINANCIAL PRACTITIONERS ASSOCIATION OF SINGAPORE

is the nation's most established and foremost non-profit organisation dedicated to promoting the ethical and professional standards of the financial services industry. It provides a forum for ongoing discourse on issues pertaining to the industry and is a collective voice for its membership on legislative and policy-related discussions. More importantly, IFPAS, through its designation routes, provides a framework to calibrate and normalise the value given by the disparate qualifications and certifications in the industry.

# ABOUT BRIAN TRACY

**BRIAN TRACY** is Chairman and CEO of Brian Tracy International, a company specialising in the training and development of individuals and organisations.

Brian has shared his ideas with thousands of companies globally and addresses more than 250,000 people every year on topics ranging from personal development, career advancement, leadership and management as well as entrepreneurship. He has studied, researched, written and spoken for more than 30 years in the fields of economics, history business, philosophy and psychology.

He is the bestselling author of over 45 books that have been translated into dozens of languages. He has written and produced more than 300 audio and video learning programmes, including the worldwide, best-selling Psychology of Achievement, which has been translated into more than 20 languages and is conducted in more than 40 countries worldwide.



## ABOUT THE COURSE

“This course simply blew my mind away. There were so many ideas and information that I was not aware of when I embarked upon the Agency Management career. If I had attended this programme at the commencement of my management career, it would have saved me many years of hard work, frustration and soured relationships.”

*Loy Chee Tong* MBA (Financial Services), CWM & BA  
Director, Financial Services, Great Eastern Life

“Terrific! It helps me bring out the best in my line managers through a simple and effective framework. It is simply the best investment that I've made in my people!”

*Christopher Lee*  
CEO, ShareInvestor

## ENQUIRIES

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# PRACTICE MANAGEMENT COURSE

PRACTICE  
LEADERSHIP  
COURSE

CERTIFIED  
PRACTICE  
MANAGER  
DESIGNATION



This course focuses on the **PROCESS** aspect of structuring and building a successful practice. It includes sharing of tools and templates designed for the Asian markets and are customisable for individual use.

# ABOUT THE PRACTICE MANAGEMENT COURSE

**THIS COURSE** can be taken individually or as a course leading to the “Certified Practice Manager” designation. It is conducted by certified Brian Tracy trainers and exclusively marketed by the Insurance and Financial Practitioners Association of Singapore (IFPAS).



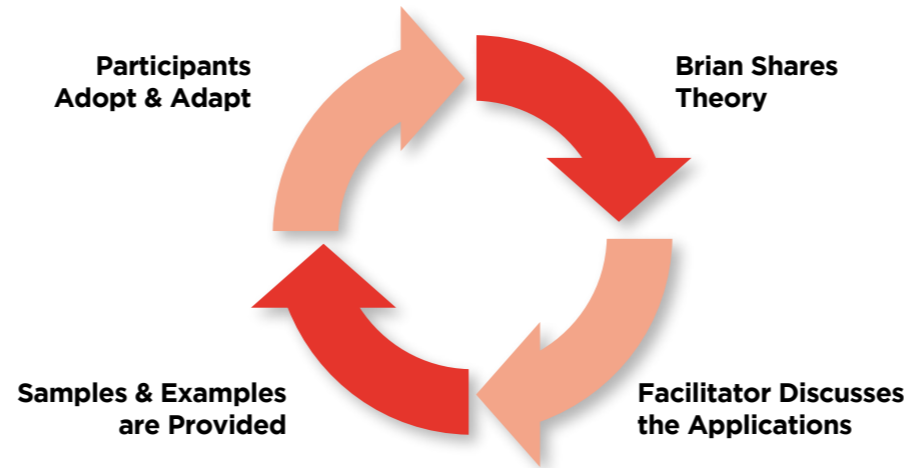
## OBJECTIVES

**THE PRACTICE MANAGEMENT** course focuses on the PROCESS aspect of structuring and building a successful practice. It progresses from foundational topics like vision, mission and value setting, recruitment planning and selection, to performance supervision and finally staff training and de-hiring. Tools and templates that have been designed for the Asian markets are shared and customised for individual use.



**\*CHOICE OF ELECTIVES** Recruitment, Selection & Interview • Coaching • Grooming Next-Generation Leaders • Leadership Communication • People Profiling • Sales Builder • Incentive, Reward & Recognition • Conducting Training

## COURSE PEDAGOGY & HIGHLIGHTS



### HIGHLIGHTS

- ▶ Comprehensive
- ▶ Key Skills & Knowledge
- ▶ Practical & Proven
- ▶ Samples & Examples
- ▶ Tools & Templates

## TARGET AUDIENCE

Leaders and Managers in the Financial Services Industry, for example Heads/Managers of Financial Advisory Firms, Insurance Agency Leaders/Managers and Bank Relationship Managers



## COURSE DURATION 4.5 DAYS

### MODULE 1

#### OUTSTANDING PRACTICE MANAGEMENT

- Understand the importance of being a Practice Manager
- Overview of the Roles & Responsibilities
- Understand the critical success factors of managing a practice

*Templates: Checklists of KRAs, Annual Schedules, etc*

### MODULE 2

#### BUILDING A SUCCESSFUL PRACTICE CULTURE

- Understand the concept of Practice Culture
- Familiarise with the factors that influence a Practice Culture
- Formulate the Vision, Mission and Values
- Develop the Operational Manual

*Templates: Practice Handbook, etc*

### MODULE 3

#### RECRUITMENT STRATEGIES FOR FAST GROWTH

- Review the Recruitment Process
- Evaluate the different approaches to recruitment
- Determine the sources of recruitment
- Formulate an effective recruitment plan

*Templates: Psychographic Profile of an Ideal Candidate, Recruitment Strategies, Recruitment Goals, etc*

### MODULE 4

#### HIGH IMPACT CAREER PRESENTATION

- Learn to approach a prospective candidate
- Present the career and its benefits effectively
- Resolve the more commonly encountered concerns to the career

*Templates: Scripts for Approaching Candidates, Objection-handling methods, etc*

### MODULE 5

#### SELECTING PEAK PERFORMING SALES AGENT

- Understand the keys to effective selection
- Do's and Don'ts of selecting
- Formulate the selection process

*Templates: Candidate Suitability Checklist, etc*

### MODULE 6

#### MARKET PLANNING FOR SUCCESS

- Develop a marketing plan for the sales agent
- Develop a sales activity plan for the sales agent
- Review the habits to prospecting success

*Templates: Formula for Establishing a Reservoir of High-Quality Prospects, Template to Align Income with Activity Goals, etc*

### MODULE 7

#### PERFORMANCE MANAGEMENT AND SUPERVISION

- Understand the keys to effective supervision
- Identify and resolve performance issues
- Manage poor performance sales agents

*Templates: Strategies for Dealing with Performance Issues, Supervision Schedule, etc*

### MODULE 8

#### CONDUCTING EFFECTIVE TRAINING AND MEETING SESSIONS

- Understand the importance of training
- Review the training process
- Learn to conduct an effective training session
- Learn to organise an effective meeting session
- Review the keys to effective sales meetings

*Templates: Lesson Plan, Recommended Topics for Practice Training, etc*