



# Field leadership series workshop

## Finding the right people

### The challenge you face

The financial services industry is facing a gathering storm as steadily dropping recruiting and four-year retention rates diminish the capacity for clients to access face-to-face insurance and financial planning. In fact, the shrinking number of advisors was identified as one of the industry's top two problems.<sup>1</sup>

Recruiting is the lifeblood of the financial services industry. With the cost of recruiting and training one new associate reaching upwards of \$250,000, bringing the best candidates with the greatest likelihood to succeed into the business is now more vital than ever.

Determining the right recruiting sources and selecting the best candidates for your agency can be a challenging process. What can you do to improve the quality of candidates you are recruiting?

### The solution we offer

*Finding the Right People* gives you the tools you need to recruit and select the right associates for your firm.

By focusing on the strategies implemented by the most productive agencies as measured by first-year commissions, this one-day workshop provides strategies that will dramatically improve the way you recruit new associates into the business.

Improving the quality and quantity of your new associates is possible. *Finding the Right People* provides the solution that will position your firm for success.

Maximize your recruiting and selection results.

<sup>1</sup> *Finding the Right People*. Falls Church, VA: The GAMA Foundation for Education and Research, 2006.

### Build your championship team

Agencies and firms with highly productive advisors apply a consistent, systematic approach to recruiting and selection, bringing only the best candidates on board. Discover the processes these agencies use to —

- Identify an ideal candidate profile.
- Balance primary and secondary recruiting sources.
- Optimize referrals and manage centers of influence effectively.
- Create a comprehensive selection process.
- Assess candidates for fit, willingness, and ability.

### Learn from the best

*Finding the Right People* features best practices from agencies and firms with some of the highest productivity rates among first-year advisors in the industry. Featured speakers and facilitators include Management Hall of Fame inductees and field leaders whose organizations have earned the Master Agency/Master Firm/Master Multiline designation, or you can have your own in-house trained facilitator.

### Get results

During this highly interactive workshop, you will hear from the masters, share ideas with your peers, assess your current practices, and develop an action plan to enhance your recruiting and selection process.

### Contact

For more information, contact [learning@finseca.org](mailto:learning@finseca.org).