



# Essentials of leadership & management

## Your Roadmap to Success

### The Challenge You Face

Continual change and dynamic environments characterize the current financial services industry. To thrive during this demanding time, there must be additional focus on leadership and management.

### The Solution We Offer

**Who** Learn the ropes of field leadership from those who have climbed to the top. Essentials of Leadership and Management is a development program that has been taken by more than 6,000 leaders worldwide. A high-performing business requires a high-performing leader. Do you have what it takes?

**How** This six-week course will get your mind racing with ideas inspired by custom-designed skills, exercises, and concepts. The blended learning experience utilizes live, virtual and self-paced learning methods. Challenging exercises reinforce each task and contribute to the program's interactive class structure. New features include:

- Culture Callouts: Explore the culture you want to create.
- Manage or Lead: Determine which hat to wear and when.
- Moment of Action: Own sole responsibility for decisions.
- Next Level: Access bonus learning content.

**What** By the end of the course, you will develop and present a business plan, *Roadmap to Success*, that includes a vision for your organization, recruiting and selection plans, training and supervisory models, and other systems and processes explored throughout the course.

### Pre-Work

- Introduction Video
- *Roadmap to Success* (business plan) Intro
- Pre-assessments on Leadership Style and Culture

### Unit One: Lead With Vision

- Core Values
- Leadership vs. Management
- Change Management
- Vision

### Unit Two: Attract the Right People

- Ideal Candidate Profile
- Recruiting Plan
- Diversity and Inclusion
- Selection Process

### Unit Three: Build High Performers

- Mentoring, Joint Work and Study Groups
- Training Plan
- Supervision Styles
- Setting Expectation

### Unit Four: Drive the Business

- Current Trends and Issues
- Ethics and Compliance
- Lifecycle of an Agency

### Unit Five: Chart Growth

- Reflect on Progress
- Self and Peer Review
- Finalize *Roadmap to Success* (business plan)

### Capstone Presentation

- Present *Roadmap to Success* (business plan)

### Contact

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