



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.