



FARMERS

University of Farmers for District Managers

Session Number W303

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2006 EXCELLENCE IN PRACTICE AWARD

- ***Organizational Learning***

2006 EXCELLENCE IN PRACTICE AWARD

- ***Career Development***



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1

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Investing in your success



Since 1928, Farmers people
have been getting you
“back where you belong.”



- **\$15 Billion revenue**
- **Operating in 41 states**
- **14,000 exclusive independent sales agents**
- **500 exclusive independent district sales managers**
- **14,000 exclusive agent employees**

Identifying the Business Problem



Organizational Problem:

Industry leading growth

- New Agent Success
- Tenured Agent Productivity
- Recruiting culture
- Coaching Skills
- District Manager tenure

Training Drivers:

Inconsistent:

- Content
 - Focused on administration
 - Not aligned with behaviors needed to deliver results
 - Geared to new or potential managers
 - No metrics in place
- Timing
 - Local courses on demand
 - Frequent delays
- Delivery
 - Decentralized training
 - Over 30 part-time Facilitators
 - Lacked credibility and/or expertise

Organizational Solution:

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- Professional, credible Facilitators
- Consistent specific core competencies
- Success Model focused on proven Best Practices
- Controlled Attendance
- Defined Metrics



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District Manager Success Model Drives Behavior Change

Behaviors

Culture Change

Shift culture to one of long-term agent performance

Improve number and productivity of new agents

Reinforce new agent training program at district level

Enhance performance from tenured agents

Activities

Daily / Weekly / Monthly

First/Final Interviews

Agency Planning Sessions

New/tenured Agent training sessions

New/tenured Agent coaching Sessions

Effective District Meetings

Planning, executing, measuring, adjusting

Core Competencies validated through R&D

Research/Development

- 960 Data collection points
- Top Farmers Agents and District Managers
- Professional Consultants
- LIMRA
- Sales Executive Council
- Strong sales/distribution firms such as:
 - Starbucks
 - ReMax
 - IBM
 - AG Edwards...





Design Considerations

Aligning DM Performance with Organizational Goals

ORGANIZATIONAL GOALS

BEHAVIOR CHANGE

KNOWLEDGE, SKILLS, ATTITUDES

ENVIRONMENTAL CONSIDERATIONS

KIRKPATRICK L4

- Realize double digit premium growth
- Increase number and success of new agents
- Enhance performance of existing agents

KIRKPATRICK L3

- Vision of Success
- Roadmap
- Best Practice Competencies and Activities
- District Progress Review support

KIRKPATRICK L2

- Leadership
- Sales
- Recruiting
- Coaching
- Fundamentals
- Business changes

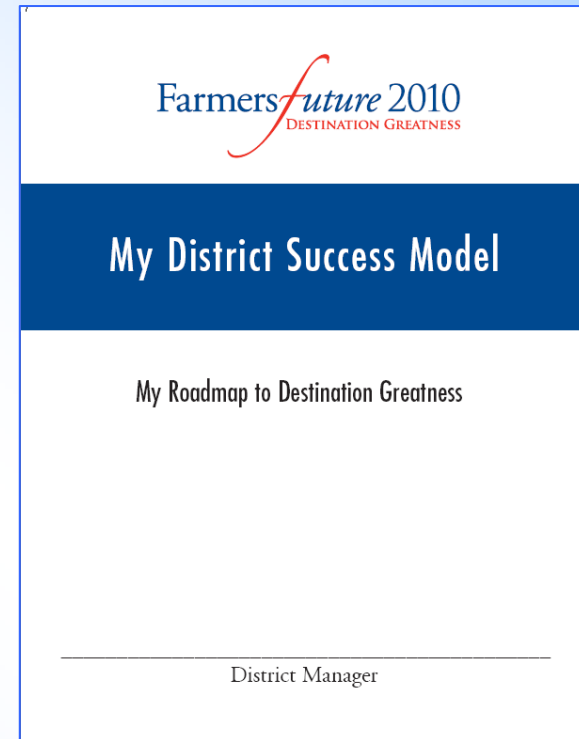
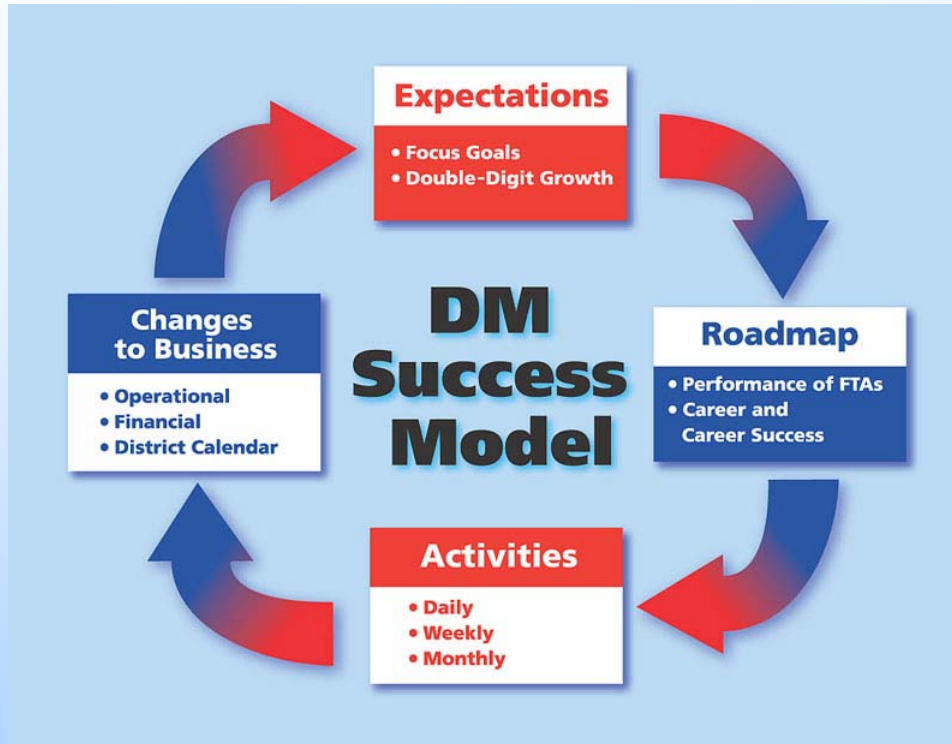
KIRKPATRICK L1

- Case Studies
- Skill Practice
- Tech Integration
- Audio/Video
- Group Work

Full Curriculum Map

Day One	Day Two	Day Three	Day Four
Session	Session	Session	Session
Icebreaker	Agent Vision	Coaching	Training Recap
Opening	Agent Roadmap		Career Success Sessions
DM Success Model	Agent Success Model		Win - Win Negotiating
Break	Motivating	Break	Break
SCORE	Break	Sales Skills	DM Success Model
Leadership (3 pieces)	Partner in Agent Success	Interviewing	Debrief and close
Lunch	Developing Agents	Working Lunch	Lunch
Success Model	Communication II	Promoting to Agents	Checkout – travel home
Leadership	Lunch	Managing Agents	
Break	Adult Learning/Mtgs/Pres.	Training	Core Competency
Communication 1 on 1	Agent Candidates	Break	Leadership
Learning Journal	Break	Training	Recruiting
Personal time	Coaching	Learning Journal	Fundamentals
Opening Reception	Market Intelligence	Personal time	Sales
Idea Share	Learning Journal	Dinner	Business
	Personal time	Training Presentations	Performance Mgt
	Consulting Homework		

Providing a Framework for Execution



Integration of Expectations and Compensation

Expectations

Aggressive increases in:

- Revenue growth
- Number of new agents
- Success of new and tenured agents
- Investment in staff
- Investment in training and job imbedded coaching

Compensation

- Increased number of new agents
- Increased success of new agents
- Increased productivity of tenured agents
- Reinforced behaviors through bonus program
- Alignment with field management and senior executive ranks

Supporting Structure

- **Goals**
- **Activities**
- **Expectations**
- **Accountability**
- **Compensation**
- **Alignment**
- **Success!**

**Agent
Success
Model:**

**Coaching
Sessions
with DM**

**District
Manager
Success
Model:**

**Coaching
Sessions
with DMM**

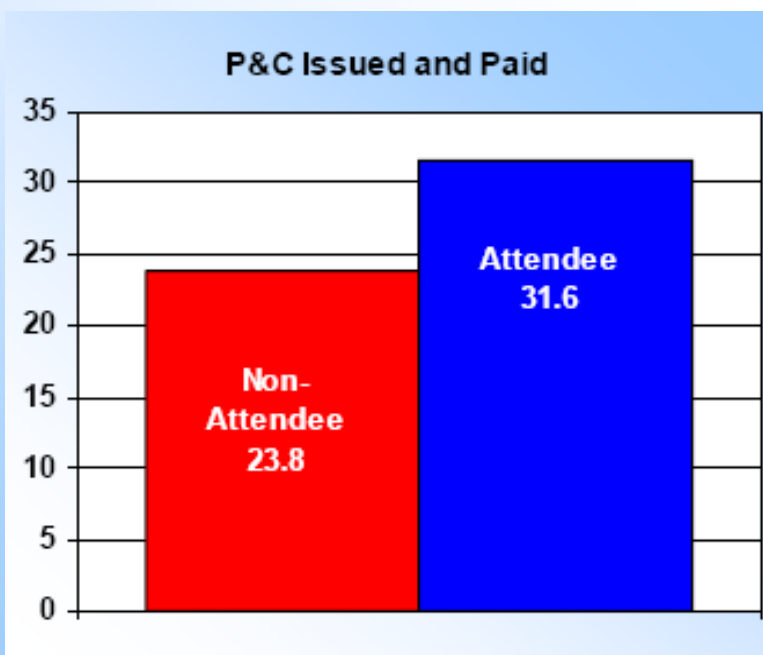


Delivering a Business Result

ORGANIZATIONAL IMPACT

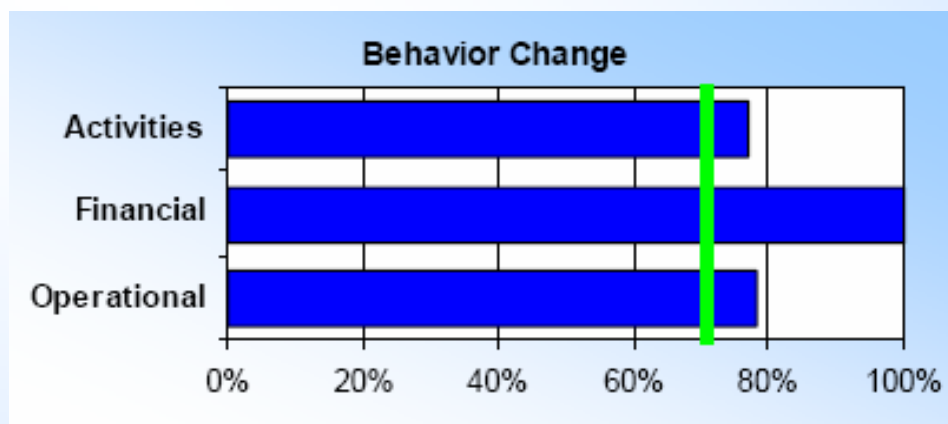
Level 4 Agent Productivity

Measures 3 months post-training against baseline avg. production before training. Attendees produced +7.8 policies per agent per month, +32.8% vs. goal +10%



Level 3 Behavior Change

Survey 3 months post-training measures active engagement in activities designed to deliver results. Validated responses with field supervisors. Engagement at 84% vs. goal 70%

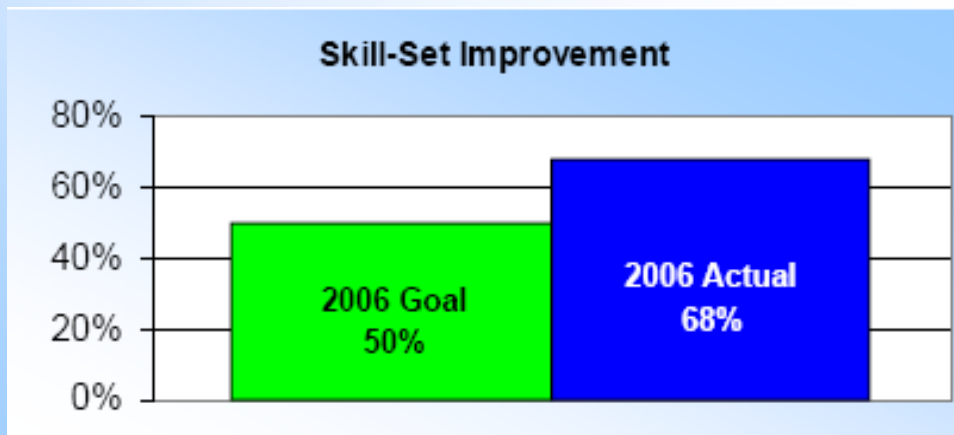


Delivering a business result

Level 2: Skill-set improvement

Increased skill and knowledge in core competencies that drive district results.

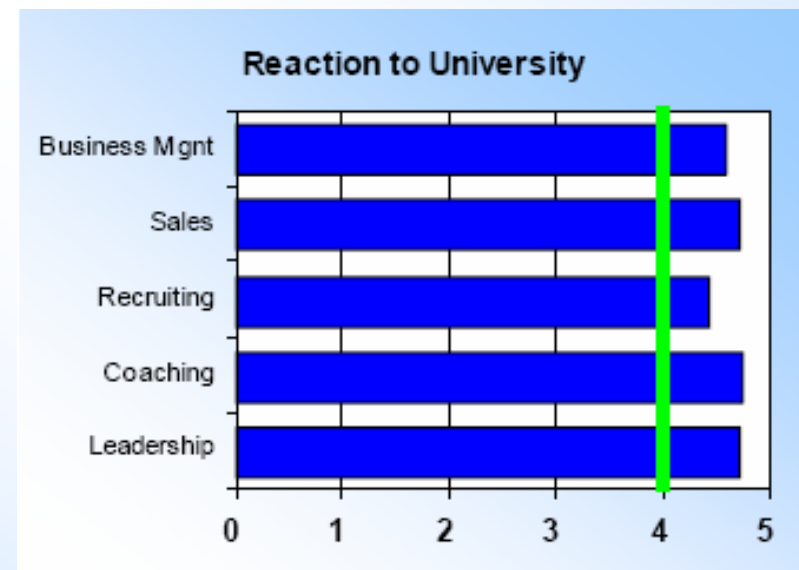
68% vs. goal of 50%



Level 1: Reaction to University

Positive quality training experience is essential for learning to take place.

Overall 4.6 vs. goal of 4.0



12

What's next?

\$17.8M return over 5 years for projected ROI of 215%...



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\$29M investment in a new Corporate University facility!

Integration into corporate culture:

- **University of Farmers for DMs – *Small Business***
- ***Journey to Success* – 24 DM-led training/coaching modules**
- **University of Farmers *for Agencies* – *Six 2-1/2 day curriculums***



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