

## 課程背景

「營銷主管專業管理系統」課程 [Professional Patterns of Management (PPM)]。此課程專為營銷領導及經理而設，協助他們建立一個可持續發展的營銷機構。PPM課程目前被中國、日韓以及美加各國機構採用，提供專業培訓、專業認證服務。學員如成功修畢，將獲頒發國際認可的「特許營銷領導 Chartered Financial Field Leader (CFFL)」專業認證。



# KINDER MANAGEMENT ACADEMY

## 課程目標

課程以業績增長、營業員發展及有利潤營運為重點，

讓營銷領導可以：

- ✓ 建立以系統為本的營銷團隊
- ✓ 招募及評估高潛質的代理人
- ✓ 學習有效培訓及督導代理人的方法
- ✓ 掌握強化團隊競爭力的法規
- ✓ 在營業處建立市場推廣文化
- ✓ 發揮領導技能及提升溝通技巧

香港人壽保險經理協會  
General Agents and Managers Association of Hong Kong (GAMAHK) 、  
Kinder Brothers International (KBI) 及  
博栢學會 Prime Learning Institute (PLI)  
合作推廣「特許營銷領導」(CFFL) 資格認證課程





# CFFL

## Professional Patterns of Management Program

<http://kinderbrothers.com/agency-leaders/>

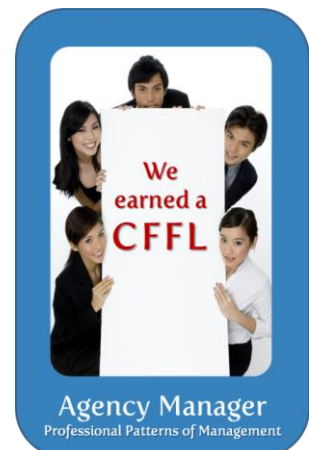
Professional Patterns of Management (PPM) is KBI's signature management development training program. Three key elements are the constants in a management career: *Production Growth*, *Producer Development* and *Profitable Operations*. The PPM program focuses on these elements resulting in overall improved management effectiveness.

Those who complete the PPM are granted the **Chartered Financial Field Leaders (CFFL)**, an international designation from the Kinder Management Academy.

Many companies rely on Kinder Brothers' PPM program to train Agency Leaders. Objectives include:

- Provide Agency Leaders with tools to move to the next level
- Become a "systems-based" agency, rather than a "personality-driven" agency
- Strengthen competitive edge

Kinder Brothers' PPM has been incorporated into many companies located in China, Taiwan, Hong Kong, Singapore, India, Japan, Malaysia, Indonesia, South Korea, Taiwan, Brazil, Canada, United States, Mexico, Argentina and others.





<http://kinderbrothers.com/agency-leaders/>

### **Professional Patterns of Management trains managers to:**

- Select, evaluate and recruit high-potential agents
- Educate and train agents
- Communicate effectively
- Motivate agents
- Create a marketing culture in the agency
- Set agents up for early success
- Monitor and measure agent productivity
- Develop leadership skills
- Plan for agency growth

### **Modules of Professional Patterns of Management:**

1. How Agency Leaders Think and Plan
2. How Agency Leaders Recruit Winners
3. How Agency Leaders Educate and Train
4. How Agency Leaders Communicate and Market
5. How Agency Leaders Manage Finance
6. How Agency Leaders Monitor and Measure
7. How Agency Leaders Multiply to Maximize
8. How Agency Leaders Motivate and Lead
9. How Agency Leaders Embrace Ethical Conduct
10. How Agency Leaders Live in Balance







# CFFL Trainer Organisation 導師團隊



<http://kinderbrothers.com/certified-trainers/>

## Chief Trainer 首席導師

Dr. Peter Lau

## Executive Trainer 執行導師

Au Shui Shing Tony

Ip Ka Man Agnes

Chan Kit Yan, Kit

Lam Cheuk Fai

Dr. Stephen Chan

Lam Man Ying Lillian

Eddie Man Piu Cheng

Lee Man Hong, Issac

Thomas Y K Cheung

Ngai Chun Wai, Vera

Chow Man Shan

Yau Yuen Lei, Roberta

HO, Gary Ka Lai

Yip Kit Ling, Katy

Hui Yuk Fong Aster

Yiu Man Fai, Colan

Hung Yiu Chung Raymond

Yiu Yam Shun Patrick

## Professional Patterns of Management (PPM)

### 營·銷·主·管·專·業·管·理·系·統

無論這是在管理方面的首次培訓，還是你想通過這次培訓來提升你的管理。

技能與知識結構,完成本課程以後你將成為更優秀的行銷主管。

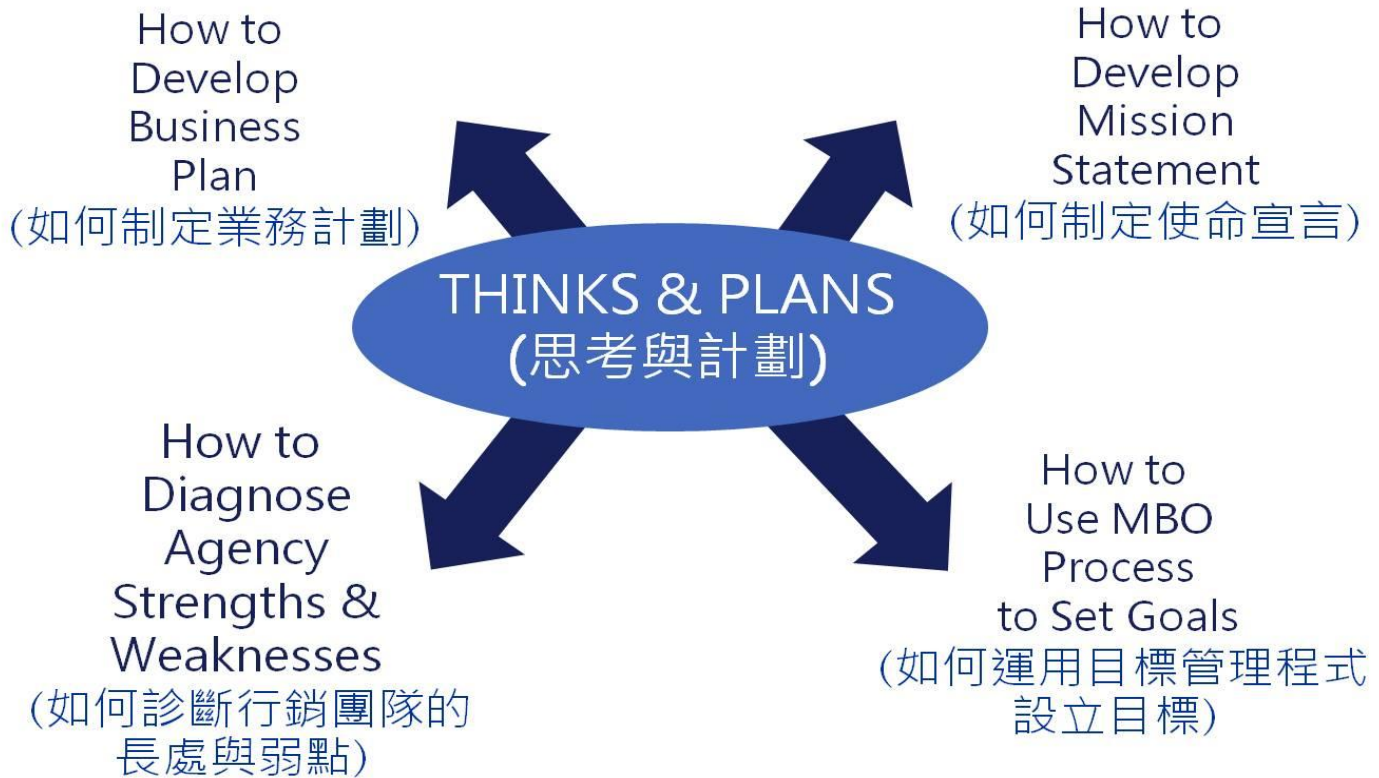
Jack Kinder, Garry Kinder在銷售、銷售管理、營業部經營以及培養像你這樣成功的行銷主管方面都有著非常成功的經驗。

1976年, Jack 和Garry 創建Kinder Brothers International(KBI),為美國國內與國際上超過300家公司提供深入的培訓課程。他們今天仍然在為許多公司提供建議和服務。他們公司理念是「透過能力建立信心」,意思是能力的培養受到信心的影響,而信心則為能力所影響。 Jack 和 Garry Kinder與他們的團隊在信心與能力之間已經搭建了橋樑。他們的核心強項是傳授系統管理的基本技能。

本課程側重於成功管理一個行銷組織的基本要素,對行銷主管來說是一門必修的課程。

## PPM 課程結構

- 序曲及10個單元  
Introduction plus 10 modules
- 學習模式 Learning Model
  - 課前閱讀 Pre-module readings
  - 雙向講授 Interactive lecture
  - 導師輔助討論 Facilitated discussion
  - 課堂練習( 小組及個人)  
Classwork (Group and Individual)
  - 功課 Assignments



## 6 Key Concepts 六個關鍵概念



Philosophy (經營哲學)

MBO Process (目標管理程序)

Agency Year-by-Year Model (營銷團隊逐年模式)

Agency Profile (營銷團隊輪廓)

Procedures on Paper Manual (管理程序手冊)

Management Responsibilities (管理者的責任)





## 5 Key Concepts 五個關鍵概念



The Number One Job (首要工作)



Pinpointing the Talent (識別人才)



Searching Sources (尋找來源)



Structured Interview (結構性面談)



Recruiting for Growth Workbook  
(招募工作手冊)





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## 7 Key Concepts 七個關鍵概念





## 4 Key Concepts 四個關鍵概念

 Communication Philosophy 溝通哲學

 Communication Principles 溝通原則

 Communication Methodology 溝通方法

 Communication System 溝通系統

How to Develop  
Marketing Strategies  
(如何發展營銷策略)

How to Help Agents  
Build A Personal  
Marketing Plan  
(如何幫助營銷員  
建立個人營銷計劃)



How to Maintain  
Marketing Effectiveness  
(如何維持營銷的有效性)

## 4 Key Concepts 四個關鍵概念



Marketing Philosophy 營銷哲學



Marketing Strategies 營銷策略



Marketing Plan 營銷計劃



Key Factors of Marketing Effectiveness  
確保營銷有效性的關鍵因素



Ways to Control  
Cost  
(控制成本方法)

To Understand Financial  
Management  
(了解財務管理)



How to  
Prepare Budget  
(如何準備預算)

How to  
Diagnose  
Financial Conditions  
(如何診斷財務狀況)

How to Set Personal  
Financial Goals  
(如何設定個人財務目標)

## 7 Key Concepts 七個關鍵概念

**Financial “Four Percenters”** 財務的 “百分之四者”

**Financial Goal Setting** 財務目標設定

**Income ( And Cash Flow ) Statement** 收入 ( 現金流通 ) 報表

**Balance Sheet** 資產負債表

**Budget** 預算

**Living Within Your Means** 避免入不敷出

**Liquidity, Risk & Return** 資金流動性、風險與回報

How to Set Goal  
for Commitment  
如何為承諾而設定目標

MONITORING & MEASURING  
監督與評估

How to  
Set Effective  
Measuring  
System  
如何建立有效的評估系統

How to  
Set Effective  
Monitoring  
System  
如何建立有效的監督系統

## 6 Key Concepts 六個關鍵概念

Production Triangle 產能三角形

Growing Winners 栽培贏家

“PEP” Sessions 績效評估與計劃會議

Staying Brilliant On The Basics 在基礎面上保持卓越

Achieving Vertical Growth 實現直線成長

Set the Management Focus Monthly 建立每月管理重點

How to Build  
Multiplying  
Philosophy  
(如何建立  
乘數倍增哲學)

How to Develop  
Multipliers  
(如何發展倍增效應者)



How to Build  
Leadership Competencies  
(如何培養領導能力)

## 3 Key Concepts 三個關鍵概念



Winners' Philosophy 贏家哲學



Develop Multipliers 發展倍增效應者



Build Leadership Competencies 培養領導能力



How to Enhance  
Leadership  
如何增強領導能力

How to Apply  
Hierarchy  
of Needs  
如何應用  
需求層次



How to Use 8 Motivational  
Dimensions in Motivation  
如何運用八個激勵層面

## 6 Key Concepts 6個關鍵概念

 **The Hierarchy of Needs** 需求層次

 **Motivating at the Higher Levels** 高層次的激勵

 **8 Motivation Dimensions** 八個激勵層面

 **Effectiveness Versus Efficiency** 效益與效率

 **Developing Time Sense** 培養時間觀念

 **Enhancing Leadership** 增強領導能力



## 5 Key Concepts (5個關鍵概念)



Compliance Consciousness 遵紀守法的意識



Philosophies That Win 贏的哲學



Practices That Succeed 成功的實踐



Profitable Benefits 利益



Bringing Out The Best In Others 激發他人發揮最大潛力

### Live in Balance 獲得生活平衡

How to Maintain  
Success through  
Living a Focused  
and Balanced Life

(如何通過專注與平衡的  
生活而持續獲得成功)

How to Have  
Personal Goals  
for the Five  
Most Important Areas  
of Your Life  
(如何在生活的五個重要  
方面建立自己的個人目標)

### 3 Key Concepts (3個關鍵概念)



關注專注 **Focused Attention**



每一刻均保持平衡 **Balance Across Time**



核心生活事項 **Core Life Issues**