

Module 6:

**PURPOSE Management WORKSHOP
(2-Day Workshop, 9.00am – 6.30pm)**

Aim:

This 2-day PURPOSE Management & Productivity Management workshop gives a holistic overview of a boosting your business Productivity in a Purposeful manner as frameworks to customize your Professional Practice for your business.

Purpose and benefits:

Professionals will reflect upon your own Purpose in Life and be secure in your Professional Identity. Participants will gain insights into

- PURPOSE Management
- Being secure in your Identity in this Profession
- Setting Personal Mission Statements
- Setting SMARTER Goals
- Different Personalities
- Different Money Personalities
- Designing Client Networking List
- RIGHT Time Management
- Achieving your Maximum Capacity
- Increasing Your Influence
- Inspiring Your clients and advisers to great heights
- SELF Management
- Health and Wealth using Field-Tested methods and Proven Strategies.

Fulfil your calling and achieve the potential you truly deserve. Do what is right, purposeful, important the smart way. Achieve your maximum capacity and get ready to set the world ablaze!

In this workshop, we will delve deeply into the 7-Step PURPOSE Management Process and how all these can lead to greater productivity and purpose in your business. There will be an introduction into the effective strategic management of your business environment to poise your business for strategic growth (GROWTH Management).

This module is part of the 7-Module Certified KASHGrowth Professional (CKP) series. Completion of the CKP Series will strengthen your Identity as a Professional, positively Impact your clients' finances, enhance the knowledge you impart to your clients and advisers, increase your Influence in their lives and Inspire them to achieve even more. Participants can expect to enhance their Professionalism, enlarge their Productivity and expand their Profitability.

Learning Outcomes

By the end of the workshop, participants will be able to

- Understand the Leadership and Competency Framework – YOUR KASHGrowth
- Understand and Apply the PURPOSE Management
- Understand and Set Personal Mission Statements
- Understand and Set SMARTER Goals
- Understand and Apply Different Personalities
- Understand and Apply Different Money Personalities
- Understand and Design Client Networking List
- Understand and Apply RIGHT Time Management
- Understand and Apply your Maximum Capacity
- Understand and Apply SELF Management in a business meeting environment with your clients as part of the wealth planning process in advising clients.

Participants will also be able to

- Briefly describe the Journey to RETIRE framework,
- Briefly describe the Journey of HEALTH framework,
- Briefly describe the Journey for LEGACY framework,
- Understand CLIENT Management to effectively perform Client Attraction & Client Retention
- Recognise the PRACTICE Management framework to better organize your professional practice
- Recognise the GROWTH Management Framework to better identify the various factors that can poise your business for strategic growth.



Target Audience

- Wealth Managers, Financial Advisers, Insurance Advisers
- Estate Planners, Will-Writers
- Bankers, Relationship Managers
- Financial Intermediaries aspiring to enter the estate planning market will be more equipped and more confident.
- Senior Financial advisers will now have a comprehensive framework that consolidates all of their previous learning into an easy-to-remember and easy-to-present “Journey Style” presentation.
- Managers and mentors can deepen their learning and adopt a more holistic approach to coaching their advisers.

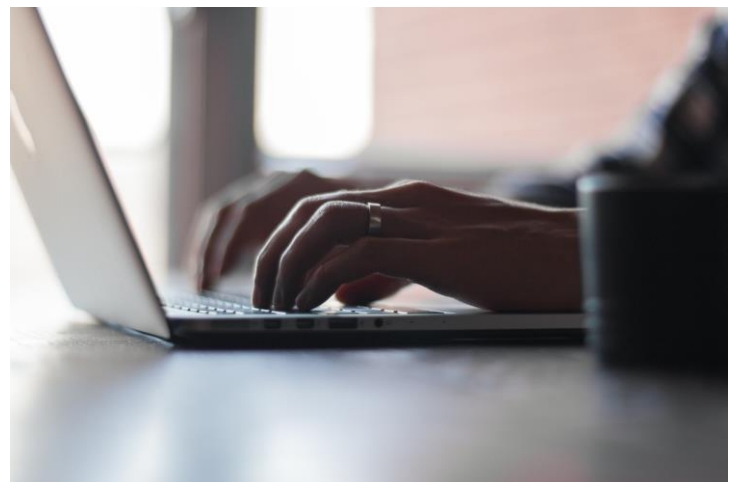
Name of Organisation/ Course Owner

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Teaching Styles

The program will be conducted through case studies, role plays, short lecturing, group discussions and sharing, personal reflections and peer learning.

This program is designed using adult learning concepts. Gayne’s and/or KOLB’s design theories are applied together with sound design principles, effective retention strategies so that different types of learners (Visual/Audio/Tactile/Kinaesthetic learners) can achieve the learning outcomes and subsequently transfer and apply their learnings in their workplace.



The Outline of the 2-Day Workshop

Lesson Plan - DAY 1

Lesson 1: Overview of Leadership and Competency Frameworks

- Introduction and Objectives setting
- Introduction to proprietary Competency Framework YOUR KASHGrowth
- The Comprehensive PURPOSE Management Framework
- Discussion Case Study
- Small Group Discussion
- Large Group Sharing

Lesson 2: Your Purpose in Life

- Yardstick
- Personal Mission Statement
- SMARTER Goals
- Business & Production Goals
- Ownership of Goals
- Your Responsibility vs Victim mentality
- Personal Reflection & Group Discussion

Lesson 3: Understanding Your Self

- Your Money Purpose
- Your Money Personality
- Your Money Preference
- Engaging Clients of Different Money Purposes
- Engaging Clients of Different Money Personality
- Engaging Clients of Different Money Preferences
- Personal Reflection & Group Discussion

Lesson 4: Reflection

- Why Reflect?
- Purpose of Reflection
- Frequency of Reflection
- Coaching vs Counselling
- Role of a Coach
- Personal Reflection & Group Discussion

Lesson 5: Purpose Management

- Writing Your Personal Mission Statement
- Personal Core Values
- Assignment
- Personal Reflection and Small Group Discussion

Lesson 6: SMARTER Goals Setting

- Setting Your SMARTER GOALS
- Family
- Business
- Professional Growth
- Pleasure
- Community
- Health
- Personal Reflection and Small Group Discussion



Lesson Plan - DAY 2

Lesson 7: Developing Your Networking List

- Networking List Management
- Business Goals
- Prioritising Clients
- Personal assignment
- Personal Reflection and Small Group Discussion

Lesson 8: Time Management

- Designing Your Time Slots. Daily, Weekly, Monthly, Yearly
- What is Your Maximum Capacity?
- What's Important? What's Urgent?
- What's Purposeful? What's Productive?
- Work Hard vs Work Fast
- Work Smart vs Work Right
- Planning Your Year a Year Ahead!
- Personal Reflection & Group Discussion

Lesson 9: Organisational Management

- Your Role within your Organisation
- Increasing your Circle of Influence
- Selecting and Building Your Team
- Stages of Team Building
- Personal Reflection & Group Discussion

Lesson 10: SELF Management

- Managing your SELF
- The Importance of Physical Health
- The Emotional Aspects to your business to keep the fire burning
- The Importance of Leisure to recharge and re-energise your Mind
- The Spiritual aspects to your business
- Personal Reflection & Group Discussion

Lesson 11: The Environment

- The Global Environment
- The Regulatory Environment
- The Operating Environment
- The Workplace Culture
- Personal Reflection & Group Discussion

Lesson 12: Wealth Management as part of Comprehensive Wealth Planning

For Your Clients – Wealth Protection as part of Comprehensive Wealth Planning

- The Comprehensive Framework for managing Wealth - Journey WEALTH
- Guarding Your Wealth – Journey of HEALTH
- Gaining More Wealth – Journey to RETIRE
- Giving Your Wealth – Journey for LEGACY

For Your Professional Practice – Wealth Protection as part of Professional Practice

- Growing Your Practice – PRACTICE Management
- Getting Your Goal – Productivity
- Management thru PURPOSE
- Guiding Your Business – GROWTH Management
- Personal Reflection & Group Discussion

Contact Us

Tel: +65 9090 7093
Email: contact@finerty.com.sg

10 Anson Road #27-15
International Plaza
Singapore 079903

Finerty Academy Pte Ltd
www.finerty.com

