

GENISTAR
Financial Freedom For All

Welcome to the Genistar Journey

Senior Team Leader



Your path to excellent leadership and building an effective team starts here.

What we will explore:

Objectives

Responsibilities

Action Steps for Success

Soft Skills for Progression

What does a good Senior Team Leader look like?

Steve Jenkins



A good Senior Team Leader adopts a “Builder’s Mindset” philosophy. They understand that their role is no longer just about personal success, but about building and developing others.

Understand that your income and success are now intricately tied to your team’s accomplishments, not just your own efforts. This means allocating substantial time and energy to developing and supporting your team members.

Advice from Steve:

- Focus on building and developing others rather than just your own performance.
- Aim to recruit a minimum of five new team members per month.
- Work on developing a “five-star market” by qualifying them and asking better questions.
- Consistently bring team members along on appointments to train and develop them.
- Embrace new responsibilities like helping team members get licensed, conducting role-playing sessions, attending events and cheerleading your team and company.



Objectives

As a Senior Team Leader, your primary objectives revolve around learning how to lead and develop other leaders within your team.

This includes fostering a recruitment mindset and teaching your team members to recruit effectively.

You should focus on mastering time management and diary control, ensuring that you can balance your personal business activities with the needs of your team.

Responsibilities

Your responsibilities include developing and coaching new team leaders, which is critical for building a strong organisational structure.

Training - You need to take an active role in training your team members, helping them get licensed, and conducting practice sessions to prepare them for assessments.



Inspiring - Additionally, you are responsible for motivating and inspiring others to achieve their goals while delegating tasks effectively to promote growth within your team.

Action Steps For
SUCCESS

To be a successful Senior Team Leader, you must focus on key action steps and develop essential hard and soft skills.

These action steps include cultivating a recruitment-focused mindset and teaching this skill to others, mastering time management for yourself and your team, consistently implementing the “travel double” concept to ensure system duplication, and leveraging the Third-Party Referral System to generate a substantial number of quality referrals.

By focusing on these areas, you’ll be well-equipped to excel in your role as a Senior Team Leader and inspire your team towards greater success.

- [ ] Develop a recruitment mindset and teach others to recruit.
- [ ] Master time management and diary control for yourself and the team.
- [ ] Implement the "travel double" concept to duplicate the system.
- [ ] Master the Third-Party Referral System with 30-40 (or more) referrals.

Soft Skills for Transitioning to Senior Team Leader:

- [ ] Plan strategically for long-term team success.
- [ ] Learn your numbers and conversion rates to measure success.
- [ ] Delegate and assign tasks effectively to train and develop your team members.
- [ ] Become a person of influence to motivate and inspire others to achieve their goals.

RECRUITMENT MINDSET

Develop a recruitment mindset and teach others to recruit

Learn how to grow your team



Introduction To Recruitment
Jeff Lestz



Power Of Three
Art Williams



Recruiting Philosophy
Art Williams

Jeff and Art Williams from Primerica reveal how to leverage yourself and build a powerful team that can transform your business. Learn about the “power of three” strategy, a multiplication technique that could potentially grow your team to an impressive 363 members.

Start with your warm market and understand the importance of using qualified trainers to guide you.

Discover how recruiting could be the game-changer you’ve been searching for in your Genistar business!

RECRUITMENT MINDSET
Action steps complete

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Action Steps Checklist

TIME MANAGEMENT

Take control of your diary and time

Mastering time management and diary control for yourself and your team is crucial for maximising productivity and achieving goals.

Start by implementing a centralised scheduling system that allows for easy coordination of team activities and individual appointments.

Encourage your team members to prioritise their tasks using techniques like the Eisenhower Matrix, distinguishing between urgent and important activities.

Teach them to block out focused work time in their calendars and respect others' scheduled commitments. Introduce regular team meetings to align priorities and discuss progress, but keep them concise and purposeful.

Learn to manage your time



What If I don't have Time?
Steve Owbridge



A Full Timer's Diary
Steve Jenkins



How your EVP manages time
Jeff Lestz



The 9Fs of a Balanced Life
Dolly Bright

- [ ] Watch these videos to learn about time management.

TIME MANAGEMENT
Action steps complete

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ALWAYS TRAVEL DOUBLE

Implementing the "travel double" concept to duplicate the system with your team

Why should you always travel double



Travelling double allows for real-time learning and observation of best practices in action, whether it’s during client meetings, presentations, or problem-solving situations.

By traveling double, you create opportunities for mentorship, skill sharing, and fostering stronger interpersonal connections.

Additionally, it provides a safety net for less experienced team members, boosting their confidence and allowing them to contribute more effectively. This approach not only enhances the professional development of individuals but also strengthens the overall cohesion and capabilities of your team.

TRAVEL DOUBLE
Action steps complete

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THIRD PARTY REFERRAL SYSTEM

Get 30-40 (or more) referrals by using the Third-Party Referral System

Third Party Referral System Training



Learn how to transform your network into a goldmine of opportunities, as these industry veterans share their strategies for mastering the third-party referral system.

From cultivating the right mindset to perfecting your approach, this video offers invaluable tips on how to exponentially grow your client base and income.

Learn how he leveraged relationships to build a successful career in financial services.

Whether you're new to the concept or a seasoned professional, this video is packed with actionable advice that will revolutionise your approach to business development.

- [ ] Watch the video to learn about the Third-Party Referral System.

THIRD PARTY REFERRAL SYSTEM
Action steps complete

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Soft skills to transition to Group Leader

Steve Jenkins



This video is a coaching session between Steve and Brenda, focusing on Brenda’s transition from Senior Team Leader to Group Leader.

Discover several key factors, including the importance of discipline and consistency, mindset shifts required when moving from a traditional job to building one’s own business, the value of accountability, and the significance of continuous learning and self-improvement.

Advice from Steve::

- Develop the ability to adapt and take on new challenges.
- Seek feedback from your trainer or EVP and implement it quickly.
- Maintain a growth mindset and view challenges as opportunities for learning.
- Enjoy stepping out of your comfort zone on a daily basis.
- Stay open-minded to new ideas and approaches.

- [ ] Watch this video to learn how you can transition to Group Leader

STRATEGIC PLANNING

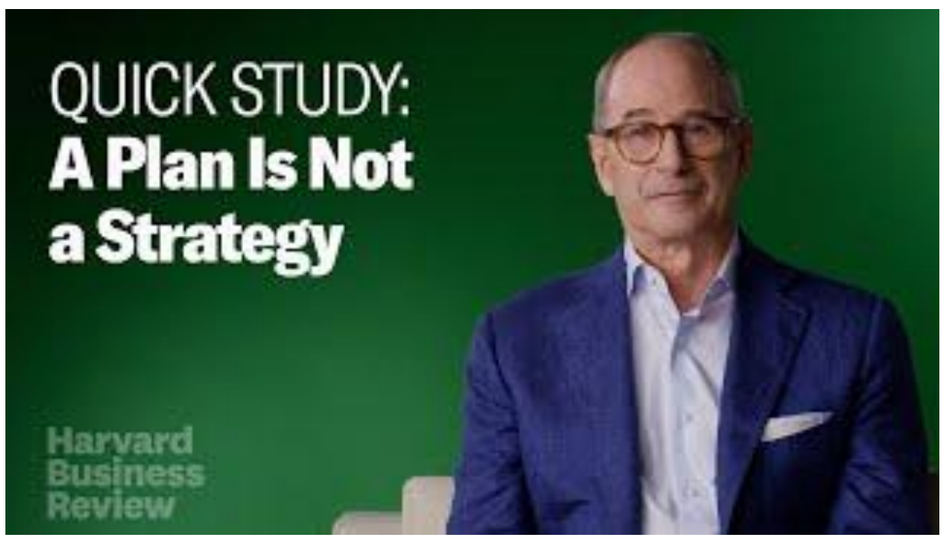
Plan strategically for long-term team success

Planning for your team's long-term success is an important part of being a great leader. You need to develop a clear vision for your team's future and create a roadmap to achieve it.

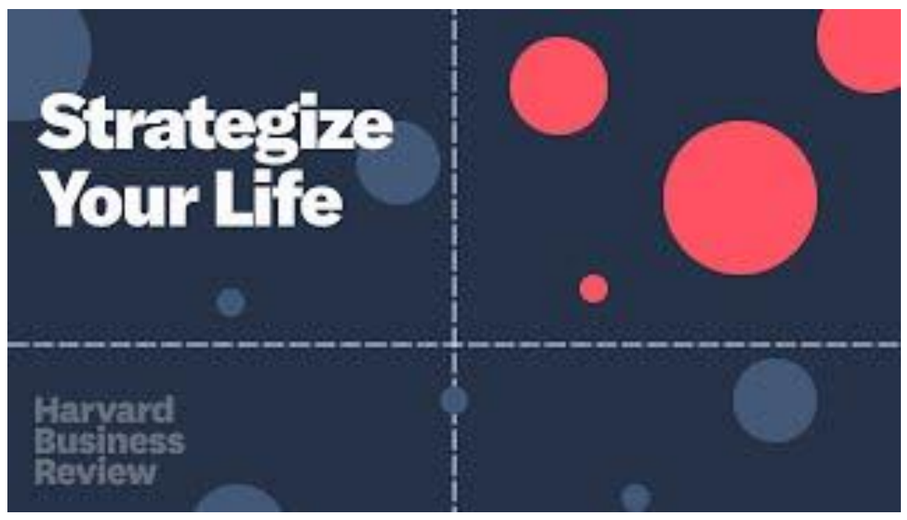
As a Senior Team Leader at Genistar, you'll focus on setting clear goals that match the company's vision, while staying ready for challenges and opportunities.

By mastering these skills, you'll be able to guide your team towards lasting success, stay flexible in a changing marketplace, and create a positive, growth-focused culture.

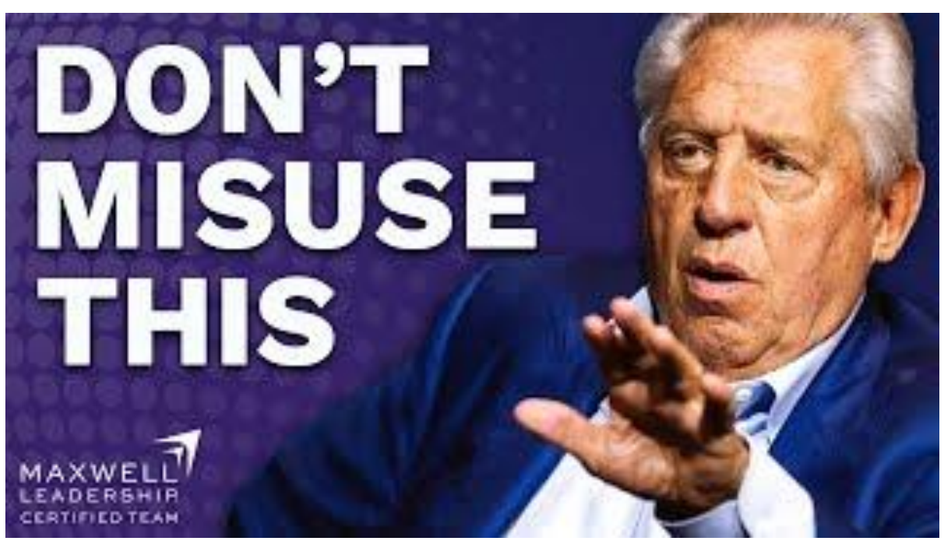
Learn from the best!



A Plan Is Not a Strategy
Roger Martin



Use strategy to create impact
Rainer Strack



Simple Ways to growth
John Maxwell Maxwell

- [ ] Watch these videos to learn how to master strategic planning

- [ ]

STRATEGIC PLANNING
Action steps complete

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NUMBERS & METRICS

Learn your conversion rates to measure impact

By keeping track of things like how many clients you're bringing in, how often financial plans are being completed, and how well your team is growing, you can get a clear picture of how your team is doing and where to improve.

Paying attention to these numbers helps you spot trends, set realistic goals, and make data-driven decisions to help your team succeed.

Become more data driven



Why everyone should be data literate

Jordan Morrow

- [ ] Watch this video to learn how to master your numbers and metrics

- [ ]

NUMBERS & METRICS
Action steps complete

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DELEGATE AND TRAIN

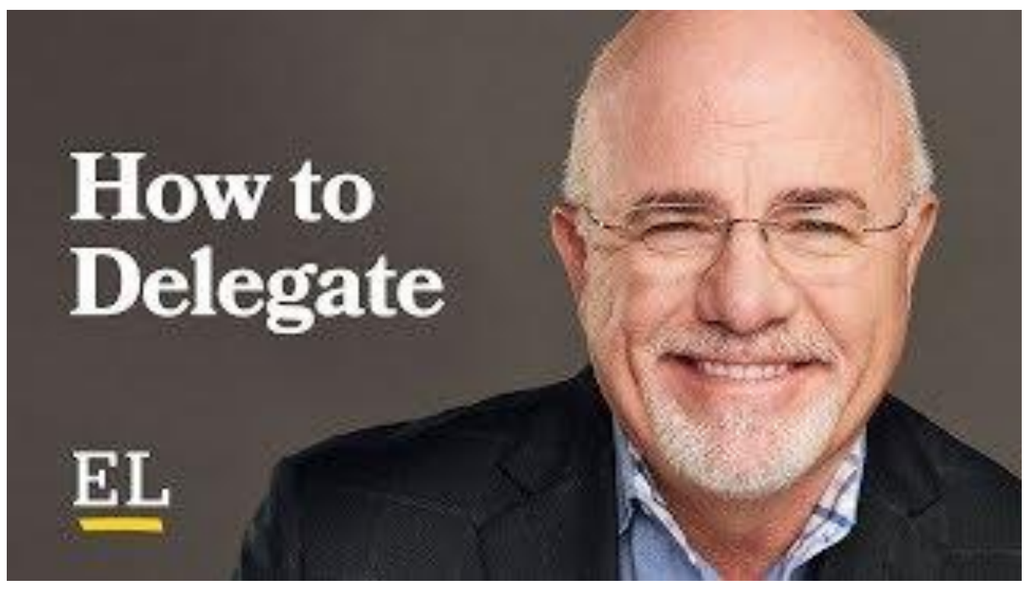
Assign tasks effectively to train and develop your team members

Assigning tasks in a thoughtful way helps you guide and develop your team. It’s not just about getting things done - it’s also about helping your team members grow.

Think about each person’s strengths, areas to improve, and personal goals when giving them tasks that challenge them and build their skills.

Be sure to give clear instructions so they know exactly what to do and how their work fits into Genistar’s bigger picture.

Videos you might like



How to Delegate
Dave Ramsey



Confessions of a micromanager
Chieh Huang



Field Training
Art Williams

- [ ] Watch these videos to learn how to delegate and train your team

DELEGATE & TRAIN
Action steps complete

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A PERSON OF INFLUENCE

Become a person of influence to motivate and inspire others to achieve their goals

Lead by example: Demonstrate the behavior and work ethic you want to see in your team. Your actions speak louder than words and can inspire others to follow you.

Articulate your vision clearly and passionately. Use storytelling to make your message more relatable and memorable.

Build genuine relationships with your team! Take time to understand their individual goals, strengths, and challenges. Show real interest in their growth and wellbeing.

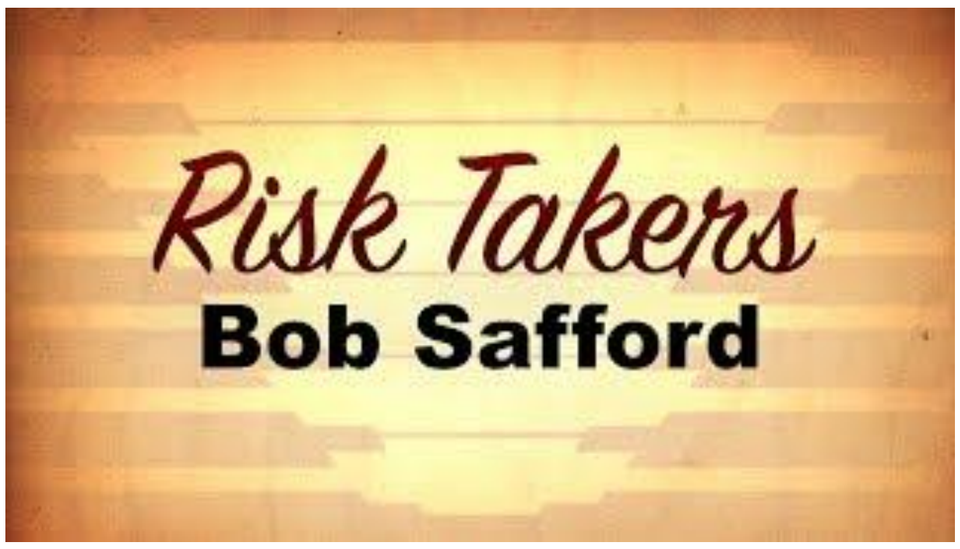
Learn from the best



Law Of Influence!
John C. Maxwell



How To Win Friends & Influence People
Dale Carnegie



Bob Safford