



NAIFA RISE

A DEVELOPMENT COURSE FOR LEADERS OF INSURANCE AND FINANCIAL FIRMS

Brian Wilson

NAIFA Trustee & Virtual Learning
Committee Chair

Lexington, KY

Loyal Member Since 2000

ABOUT THE RISE Program

NAIFA's RISE program is designed to help leaders of insurance and financial services firms create a culture to promote success.

For leaders looking to build high-performing firms, you probably already have thoughtful strategy and execution plans in place. You know where the firm is going and the milestones to get you there. However, that's only part of the story. Strong strategy-culture alignment is a common denominator among the most successful firms. "Culture eats strategy for breakfast" was a phrase originated by Peter Drucker, founder of modern management thinking. And he wasn't kidding.

Each RISE learning module includes the following elements:

- Explain: Deliver foundational conceptual knowledge (30k ft level)
- Apply: How concept is viewed or on display in the industry; show value (15k ft level)
- Evaluate: Gap analysis and reflection; learner evaluates the concept in relation to their own practice (5k ft level)
- Action: What the learner is going to do to close gaps; an action plan (ground level)

Quick Facts:

RISE has five learning modules:

- Part 1a: Cultivating a Culture
- Part 1b: Gap Analysis and Action Planning
- Part 2: Building a Team
- Part 3: Keeping Your Team
- Part 4: Maximizing Business
- Part 5: Capstone Experience

The Value to You:

- Shape your firm's culture to achieve success
- Build and motivate the right team
- Maximize your firm's potential and reach that potential
- "Better align to improve the bottom line."