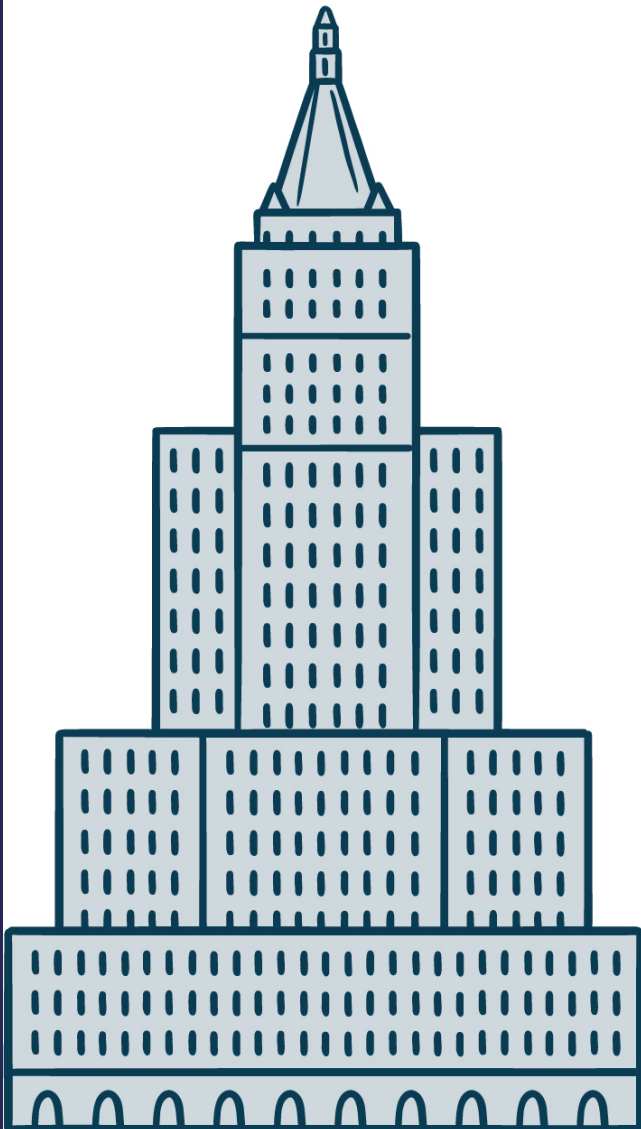


SMRU INFO

New York Life Facilitator Guide

Workshop 1 – 03

Career Opportunity Tool and Skill
Practice



Facilitator Guide

HOW TO USE THIS DOCUMENT

This facilitator guide has been compiled to accompany the PowerPoint slides used in the career opportunity experience workshop hosted by New York Life. Designed to help facilitators skillfully lead presentations and manage communication with participants, it offers an expanded review of directions, detailed instruction information, and a comprehensive look at how presentations and activities should be conducted. It provides valuable insight for both the Partner leading the career opportunity experience and the Candidate participating in the workshop. With this guide, Partners are given everything they need to ensure a successful career event that will create positive outcomes for all involved.

DAY ONE WORKSHOP SCHEDULE

Day	Session	Workshop	Time	Session Length	Facilitator
Day 1	Workshop 1-01	Welcome to PDP	8:30-9:00 am	30	Rob/Rich/Brandon
Day 1	Workshop 1-02	Recruiting Strategy Review & Plan Ahead	9:00-10:00 am	60	Rob/Rich/Zone
Day 1	Workshop 1-03	Career Opportunity Tool & Skill Practice	10:15-12:00 pm 1:00-1:45 pm	150	Zone CVP
Day 1	Workshop 1-04	How Recruiting and Agent Development Impact Your Compensation	2:00-4:15 pm including one break	135	Zone CVP
Day 1	Workshop 1-05	Quarterly Incentives	4:30-5:00 pm	30	Zone CVP

LEARNING OBJECTIVES

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

- Understand the benefits the Career Opportunity Tool
- Participate in a Live Demonstration of the Career Opportunity Tool
- Know how to run a Career Interview through skill practice (role play)

PARTICIPANTS

Understanding your audience is paramount to the successful workshop, and those participating in New York Life's career opportunity experience are no exception. These participants include Partners, who will have already gone through our interview process. As newcomers, they bring enthusiasm to become part of our mission to help families and businesses gain financial security. Our trainers aim to ensure that all new agents and Partners are given the necessary information to help them on their journey with New York Life.

DELIVERY

The best way to deliver this workshop is through classroom instructions with activities and a live demonstration. With the classroom element, facilitators can develop a comprehensive set of discussions and activities that will allow participants to become familiar with the Career Opportunity Interview. When it comes to role-playing, professionals can facilitate workshops on career exploration, mentoring/coaching sessions with NYL leaders, as well as mock interviews to better prepare Partners for the interview process when they finally meet with a New York Life candidate, ensure that both parties have the best possible experience in this workshop.

Career Opportunity Interview

DESCRIPTION: IN-PERSON WORKSHOP

WELCOME & AGENDA (135 MINUTES)

<i>Total Minutes</i>	<i>135 minutes</i>
<i>Total Activity</i>	<i>75 minutes</i>
<i>Overview</i>	<i>10 minutes</i>
<i>Live Demo</i>	<i>20 minutes</i>
<i>Debrief</i>	<i>10 minutes</i>
<i>Break</i>	<i>15 minutes</i>
<i>Role Play Part I</i>	<i>35 minutes</i>
<i>Debrief</i>	<i>10 minutes</i>
<i>Lunch</i>	<i>60 minutes</i>
<i>Role Play Part II</i>	<i>30 minutes</i>
<i>Debrief</i>	<i>10 minutes</i>
<i>Q and A</i>	<i>10 minutes</i>
<i>Total Time</i>	<i>135 minutes</i>

SAMPLE WELCOME SCRIPT (Facilitators are encouraged to use their voice)

Welcome! My name is _____, and I am thrilled to be providing you all with career opportunity experience here at New York Life. This workshop is designed for Partners to advance their careers through learning new skills and practicing their abilities. We will discuss various topics, including interviewing and career opportunities and practice some role-play exercises. By the end of this workshop, you'll have a comprehensive understanding of the Career Opportunity Interview. I look forward to having a successful workshop with you all!

DISCUSSIONS

Slide 6:

What do you think the needs of modern candidates are?

Slide 9:

How does the career opportunity experience improve productivity for you?

For your agents? For your General Office?

What is the most crucial feature of COE for you?

Can you describe your experiences with using COE?

SLIDE 19:

What specific questions do you have about the Career Opportunity Experience?

Any open questions or observations?

LIVE DEMO

The facilitators will act in the roles of Partner and Candidate.

The facilitators will use the Experience Script (41 or 9 States)

The participants in the class will be observers.

There is a brief discussion at the end of this Live Demo.

ROLE PLAY and DEBRIEF

Role play is an effective way to develop career skills, mainly when conducting interviews. By taking on the roles of either a Partner or a Candidate, participants gain insight into and experience in responding to career opportunities. Participants in New York Life role-play activities have the unique opportunity to simulate the interactions during interviews, providing them with the necessary knowledge they can apply when seeking career advancement. Role-playing assists participants in developing career-related skills while they assess their abilities.

- Prep**
- Ensure participants have the required scripts (41 States or 9 States) to complete the task
 - Break into Groups of 4 or 5 by States (41 or 9)
 - One learner is the Partner, and one learner is the Candidate; the remaining participants are observers
 - If needed, assist in creating learner groups.
- During**
- Create a “real-world” environment (physical location, attire, tone)
 - Clearly define each participant’s role (Partner, Candidate, or Observer)
 - Keep track of time
- After**
- DEBRIEF
 - Have a moment for the participant to get feedback on their performance from the class.
 - *As the group gathers again, a breakout volunteer shares their insights and ideas.*
 - *We will understand how various perspectives have uncovered key points and valuable takeaways!*