
*EXCEL*ERATED LEADERSHIP

Lead Smart. Run Smooth. Build Legacy.



PROGRAM OVERVIEW





IN-PERSON EXPERIENCE SUMMARY

Program Structure

An engaging and results-driven three-day program with six modules designed to build relationships, deliver results and influence outcomes.

Coaching Sessions

Individual coaching between sessions reinforces classroom concepts and is tailored to your specific areas for growth.

Actionable Outcomes

Exercises at the close of each module encourage practical application and continuous improvement in your day-to-day work.

Final Deliverables

Participants create a customized Talent Enhancement Plan to shape their leadership impact and serve as a roadmap for professional growth.

DAY ONE: ALIGNMENT



MODULE 1: LEADERSHIP ROADMAP

Manage Results & Build Relationships

Today's leaders must excel at two core responsibilities: delivering strong results while cultivating the relationships that make those results possible.

Learning Objectives:

- Gain a clear framework for the four phases of managing people and production—each designed to solve a specific leadership challenge.
- Learn how to build Trust as the cornerstone of high-performing teams and uncover the everyday behaviors that can unintentionally erode it.
- Identify the common obstacles leaders face when balancing performance demands with people leadership—and discover practical strategies to overcome them.



MODULE 2: LEADERSHIP LANGUAGE

Choose Your Words with Intention

Learning Objectives:

- Build awareness of the language you use and how it shapes perception.
- Strengthen your leadership impact by choosing words that inspire clarity, confidence, action and accountability.
- Understand the psychology behind language and how it influences team engagement and performance.
- Identify how pressure or routine can lead to unintentional messaging—and learn strategies to stay intentional under stress.

DAY TWO: ADAPTABILITY



MODULE 3: LEADERSHIP COMPOSURE

Control Your Emotions and Stay Composed

Master the skills to navigate tough conversations by managing your reactions and guiding others toward more productive outcomes.

Learning Objectives:

- Strengthen **Self-Awareness** by identifying your stress triggers and distinguishing whether they stem from internal or external pressures.
- Build proactive **Self-Management** strategies by replacing reactive, unproductive habits with intentional, well-reasoned responses.
- Enhance **Social Awareness** by accurately reading others' behaviors and remaining composed and objective in high-pressure situations.



MODULE 4: LEADERSHIP RESILIENCE

Solve Problems with a Minimum of Stress and Drama

Today's challenges require fresh thinking, agility, and a willingness to break old patterns. Learn how effective problem-solving and adaptability work hand-in-hand.

Learning Objectives:

- Understand how embracing the change cycle enables faster, low-drama solutions to unexpected challenges.
- Learn practical methods to overcome “we’ve always done it this way” mindsets and apply innovative approaches to real-world professional and personal issues.
- Identify the three mindset shifts necessary to coach yourself and your team through the resistance phase of the change cycle.

DAY THREE: MOMENTUM

MODULE 5: LEADERSHIP PERFORMANCE

Set Expectations, Manage Results, and Address Negative Behavior

Effective leaders prevent problems before they start—and confidently address issues when they arise. This session equips you with the tools to create clear expectations, drive performance, and correct harmful behavior with confidence.

Learning Objectives:

- Understand how your communication style can unintentionally push you toward macro- or micro-management.
- Identify the four main causes of non-performance—and learn how to eliminate them before they derail results.
- Learn how to address negative or unproductive behavior by focusing on observable actions, reducing defensiveness, and setting clear expectations.





MODULE 6: LEADERSHIP VISION

Inspire Others with a Compelling Vision

Skill and effort matter—but a clear engaging Vision has the power to unite teams, fuel momentum, and release potential.

Learning Objectives:

- Understand how to craft a professional (and personal) Vision that sparks transformation.
- Understand how strategic planning aligns and operationalizes the Vision to protect against a lack of accountability and failure to deliver results.
- Learn how to use a proven coaching model that will help you leverage the highest potential of your A players and develop the raw talent of your B players.



INTEGRATION & ACTION PLANNING

Integrating Key Concepts

- Bring together the program's most valuable insights into a unified framework that strengthens confident, high-impact leadership.

Strategic Action Planning

- Develop a personalized, results-driven action plan that turns key learnings into measurable performance gains for your business.

Capstone Commitment to Growth

- Complete the program with a clear roadmap for continued growth—solidifying your commitment to long-term transformation and success.



COACHING FOR *EXCEL-LENCE*:

Executive Coaching Sessions

This series includes **three one-on-one executive coaching sessions** designed to translate program concepts into practical, real-world leadership impact.

Executive coaching helps you:

- **Gain Awareness** – Clarify how others perceive your leadership.
- **Solve Problems** – Work through real challenges with targeted guidance.
- **Build Competencies** – Strengthen core skills based on your development needs.
- **Integrate Concepts** – Turn tools from the program into consistent daily practice.

*EXCEL*ERATED LEADERSHIP

Lead Smart. Run Smooth. Build Legacy.





START BUILDING YOUR LEGACY TODAY!

Why choose this program?

- **Credibility:** Facilitated by experts with 25+ years of leadership development and executive coaching experience in the insurance industry.
- **Practicality:** Apply proven concepts immediately—at home that evening and at work the next morning.
- **Workability:** Sessions are spaced a few weeks apart to minimize time away from home or office.



START BUILDING YOUR LEGACY TODAY!

What you'll gain:

Participants consistently report immediate, measurable improvements with:

- Stronger relationships up, down, across, and outside their organization.
- Improved individual and team accountability for results.
- Increased communication clarity and broader organizational influence.



START BUILDING YOUR LEGACY TODAY!

Your experience includes:

- **Three full days** of face-to-face learning with industry experts and peers
- **Three personalized executive coaching sessions** to help you implement powerful ideas
- **Small class size** for maximum engagement—limited to 16 professionals
- The satisfaction of investing in yourself and your future



START BUILDING YOUR LEGACY TODAY!

Program Schedule:

All sessions run 9:00 AM–4:00 PM EST

Day One – TBD

- Leadership Roadmap
- Leadership Language

Day Two – TBD

- Leadership Composure
- Leadership Resilience

Day Three – TBD

- Leadership Performance
- Leadership Vision

Location: Cohatch Broad Ripple, 6151 Central Avenue, Indianapolis, IN 46220



START BUILDING YOUR LEGACY TODAY!

Your Investment:

- Enroll by TBD and save 10%:
\$1,620 for the first participant • \$1,440 for each additional attendee
- After TBD
\$1,800 for the first participant • \$1,600 for each additional attendee
- Flexible payment options available.

Register: <https://square.link/u/QKnkhI3L>

If registering 2 people enter code: Excel-2 at checkout to apply the discount

To Find Out More:

- Call: 317-253-7847
Email: rdcripe@equisconsulting.com
Online: <https://equisconsulting.com/excel-erated-leadership-program/>

REFERENCE FOR EQUIS CONSULTING

It is with great enthusiasm that I provide this reference for Equis Consulting. Partnering with Equis has added an unparalleled level of professionalism and expertise to our agent and agency manager development efforts.

What sets Equis apart is their deep understanding of the insurance industry. Their team brings real-world experience to every engagement and consistently excels in coaching, human resources, and financial development. Early in our partnership, they took the time to truly understand our unique business model, immerse themselves in our culture, and learn our internal language—an investment that continues to pay dividends.

One of the most impactful outcomes of our collaboration has been the transformation of our approach to agency manager promotions.

Thanks to Equis, we no longer promote blindly into leadership roles. Their guidance and training programs have resulted in significantly more successful agency managers, better prepared to lead and grow.

Importantly, we don't view Equis as just a vendor; they are truly part of the KFB family. Their involvement has grown far beyond agency manager training to include staff development, leadership programs, emerging leader initiatives, and executive coaching. They have become an essential partner in our organizational growth, and we rely on their insight regularly.

I can't speak highly enough about the value Equis brings to the table. They are trusted, professional, collaborative, and fully aligned with our goals.

I look forward to continuing our partnership for many years to come.



Kentucky Farm Bureau Mutual Insurance Company
Christy Curry, Education Services Manager, Leadership Training
June 13, 2025