



# CAL Advisor

January 22, 2008

E- Newsletter Volume 1, Number 7

## In This Issue

- A Strategic Plan with a Scorecard
- Legislative Update
- Member Benefits
- Monthly Business Sales Idea

## NAIFA-California

1425 River Park Drive  
Suite 200  
Sacramento, CA 95815  
(800) 298-1025  
(916) 646-8600  
(916) 646-8130 FAX  
office@naifacalifornia.org  
www.naifacalifornia.org

## Mark Your Calendars!



Monday, May 19, 2008  
Annual Meeting

Tuesday, May 20, 2008  
Day On The Hill

Association Leadership  
Conferences (ALC)

North: Wed., July 9, 2008  
South: Thurs., July 10, 2008

## A Strategic Plan with a Scorecard

By Dennis P. Sunderman  
NAIFA-California President 2007-2008



First of all, I would like to wish you a very happy, healthy, and prosperous new year!

Most of the successful agents I know are committed to goal planning with a scorecard. After all, what good are lofty goals if you don't have checkpoints to track your progress? Association business is exactly the same. Successful locals have a plan and they work it daily, weekly, and monthly. Of our 31 State locals, two-thirds held strategic planning sessions last summer with State Board Liaisons, and several more held self facilitated sessions. So what's the reward and why bother? Well, the reward part is simple! The Association Achievement Award recognizes excellence in performance by local associations on all levels of achievement. Its purpose is to develop leadership and to promote interaction among local associations. Every year at the conclusion of the State Annual Meeting, locals that have achieved "Standards of Excellence," will be recognized in the categories of Bronze, Silver, or Gold awards. The awards ceremony is a highlight event for members and boards that have committed to having a successful year. The association achievement award application, which is located at [www.naifacalifornia.org](http://www.naifacalifornia.org), serves as the roadmap to success and provides points in each of the following categories.

Member Benefits	25 possible points	Gold Award	96 + points
Advocacy	25 possible points	Silver Award	86 – 95 points
Membership	22 possible points	Bronze Award	80 – 85 points
Governance	4 possible points		
Bonus Section	14 possible points		
Total	110 possible points		

The Association Achievement Award year is April 1<sup>st</sup> through March 31<sup>st</sup>. The application deadline is April 16 2008.

Successful locals provide excellent member value. So take a look at your scorecard and Good Luck!

### 2007-2008 Nominations application deadline – February 8, 2008

Are you interested in serving on the State Board or on a State Committee?  
The application is at [www.naifacalifornia.org](http://www.naifacalifornia.org)

### Regional Summit Meetings for Agency Managers and General Agents

On April 28-30, 2008, NAIFA Trustee and Corporate Outreach Chair Robert A. Miller and our State Executive Vice President David Dellinger will facilitate Regional Summits, specifically for Agency Managers and General Agents on the value of membership. The tentative schedule for these 60 minute meetings will be as follows:

#### Tentative Schedule

(Each meeting will be 60 minutes in length.)

##### Northern California

###### Monday, April 28, 2008

10:00 am – Santa Clara, CA, Location TBA  
1:00 pm – Walnut Creek, CA, Location TBA

###### Tuesday, April 29, 2008

9:30 am – Sutter Club, Sacramento, CA

##### Southern California

###### Tuesday, April 29, 2008

2:00 pm – Burbank Airport, Location TBA

###### Wednesday, April 30, 2008

9:30 am – Orange County Airport, Location TBA  
1:00 pm – San Diego, CA Location TBA

If you are interested in inviting someone to attend, please contact David Dellinger at (916) 761-5697 or via e-mail at [davidd@naifacalifornia.org](mailto:davidd@naifacalifornia.org).

### Annual Meeting and Day on the Hill

This year's events have been combined into a two day event May 19 and May 20, 2008. Every effort has been made to minimize travel time and expense including discounted rates at Embassy Suites and bundled rates for the conference. Convention Chair and President-Elect Michael McCaffrey is presenting a speaker line-up that includes NAIFA President-Elect Cliff Wilson, Life Foundation President Marvin Feldman, and Sacramento Journalist Dan Walters. Please mark your calendar for this incredible event and please note that local delegates are required to attend.

In conclusion, remember that strength in numbers translates into the ability to influence legislation for the protection of consumers and agents. Attend local meetings and invite prospective members. We are stronger together!

[top](#)

---

## Legislative Update



**By Michael Ables, LUTCF  
Chair, Government  
Relations Committee**



**Shari McHugh  
Legislative Advocate**

***Click on the link and get the details from the [Monthly Legislative Update!](#)***

<http://www.naifacalifornia.org/Advocacy/PDFdocs/LegUpdates/2008/Legislative%20Update%201-08.pdf>

[top](#)

---

## Member Benefits

**By Michael K. Fiamingo, LUTCF  
Chair Member Benefits**



Now that we are into the New Year, you may want to stock up on office supplies. Why not get a discount on your basic office needs by using the NAIFA discount offered at Office Depot? As an added bonus, they will deliver the order to your office free of charge with orders of \$75.00 or more. This is just one of the many discounts offered through your NAIFA membership. For a complete list of benefits, go to the <http://www.naifa.org>

website.

February has traditionally been the month to kickoff PAC and PIC activities.

With this being an election year, it is very important to support the PAC.

This would be a great time to devote a meeting on the importance of supporting the PAC and increase the number of members in your local who contribute to the PAC. A contribution of \$50 or more will add your name to the list of contributors in your local and provide funds to support our efforts with legislators who vote on issues that have a direct impact on our ability to conduct business.

NAIFA maintains one of the strongest industry political action committees, IFAPAC, and a solid grassroots political involvement committee, APIC. We are very fortunate to have such an outstanding leadership team with Mike Ables, LUTCF, Government Relations Chair, and Shari McHugh, Legislative Advocate, representing us in California and all of their capable support staff.

Our annual Day on the Hill, when our membership meets with their legislators at the State Capital will be later this year and is scheduled for Tuesday May 20th. This will be in conjunction with our annual State Meeting that is scheduled for Monday May 19th. This helps to reduce costs by having one trip scheduled for both meetings. Be sure to mark these dates on your calendars.

Another member benefit offered by our locals is continuing education and classes for professional designations. Now is the time to start lining up Spring classes for members interested in LUTC, CLU, and FSS. If you should have any questions about how to start a class, you can contact our

Professional Development Coordinator, Dave Koppa at [dave@cornerstoneins.net](mailto:dave@cornerstoneins.net).

As we now start our spring membership renewals, it is critical that we call upcoming renewals and thank those who have already renewed. These personal touches help our members realize that we appreciate their support.

Wishing you a great year for your personal, professional, and association business.

---

## Monthly Business Sales Idea



**By Joseph M. Partise, CLU**  
**NAIFA-California Vice President**  
**and Long Beach Member**  
**Owner, Joe Partise, CLU & Assoc.**

### Using the Kolbe A™ Index to Build Your Team

Recently, CNN acknowledged what LILI graduates have known for years: the Kolbe A™ Index is a valuable tool for determining the "action" style of yourself and those around you. Kolbe, an assessment tool for people in business is unlike any other personality study. It identifies the methods that we use as we work and learn. The Kolbe concept is backed by substantial scientific research and validation.

Each of us chooses different paths when taking action in business and doing the job. In recognition of this, Kolbe has named four categories into which all individuals fit. In rare instances a person may test equally across all of the categories. Typically, however, the first category is the one in which most find they initiate strongly. The next category tends to be where we are less likely to initiate and more likely to respond. The third and fourth categories are less responsive, and we may even find that we prevent action when forced down the path. The first category Kolbe defines is the "Fact Finder." A person in this category is most likely to spend a great deal of time researching an issue before taking action. The second category is the "Follow Thru." In this category, an individual works best with repetitive activities. The third category, "Quick Start," is where we find innovators and entrepreneurs. They are the "idea" people. The final category is the "Implementor". In this category, people can take ideas and make them tangible.

Hopefully you are beginning to see the point of Kolbe. Nobody initiates through all four methods, so cooperative effort is essential to bring about complete success. The first step is to identify your MO (mode of operation). You will not only learn how you can be your best, but you will also learn where you are the weakest. It's actually quite liberating to learn that you are not expected to be everything to every action! From there, you are able to focus your time, energy, and talents on the activities where you excel, while surrounding yourself with those who fill the gaps of the other modes. For example, if you are a "Quick Start," you will do best by having an "Implementor" to get your ideas off and running. Of course, a good "Fact Finder" will make sure that you have all the necessary information to make the right decisions. Finally, the "Follow Thru" can assist in managing the tasks required to bring success to the project.

You can build your team in many ways. The most obvious is your staff. Be certain that each and every one of your employees has completed the Kolbe A™ Index. You may be very surprised to find that work adjustments can be made to get more results from the same effort. Also, don't forget your business partners. You can be of greater value to each other if you are handling the activities that are most suitable for your MO. Finally, there are a number of strategic partnerships that can be created with colleagues and managers. Again, you are looking for people with strength in the areas where you are weakest. These people will be thrilled to take action in the categories where they are most effective while relying on you to support them in the areas where they lack.

The Kolbe A™ Index is a very powerful tool that can be used to build a successful team. All organizations rely on the ability of people to work together to accomplish goals that are less attainable by individuals alone. Kolbe will help you to make sure that all members succeed to the best of their abilities while receiving the greatest personal satisfaction from their efforts. Find more information at <http://www.kolbe.com>. You can also see the Oprah.com article on CNN.com's "living" page at <http://www.cnn.com/2008/LIVING/personal/01/08/o.wildly.successful/index.html>