

FACILITATOR GUIDE

Recruiting Through ARD

Auxiliary Recruiting & Development — Manager & Agent Session

Use this guide alongside the slide deck (speaker notes are also embedded in each slide). Suggested total run time is approximately 40 minutes; adjust activity depth to fit your window.

Session at a Glance

#	Segment	Time
1	Title — Recruiting Through ARD	2 min
2	What is ARD?	4 min
3	A Win for Everyone	5 min
4	ARD Delivers Real Earnings	4 min
5	Step 1 — Identify the Right Candidate	6 min
6	Step 2 — How to Ask: Conversation Starters	8 min
7	Step 3 — Build ARD Into Your Culture	6 min
8	Close & Commit	5 min

Before You Facilitate

- Confirm the 2021 earnings figures on Slide 4 against current company data; update the year if a newer snapshot exists.
- Queue the Vyond clip “ARD - The Ideal Candidate” for Slide 5.
- Send the prework worksheet ahead of time so participants arrive with candidate names in mind.
- Have the digital workbook open and ready for the closing assignment.

Slide-by-Slide Walkthrough

Slide 1 — Title — Recruiting Through ARD (2 min)

Purpose: Welcome the group and frame the session.

Say: Today we're talking about ARD — Auxiliary Recruiting & Development — and how to make it a steady source of high-quality recruits. This is a working session: we'll pause to discuss and to practice.

Do:

- Preview the agenda: what ARD is, why it's a win for everyone, the earnings impact, then three steps — identify, ask, build culture.
- If you assigned the prework worksheet, ask for one quick takeaway.

Slide 2 — What is ARD? (4 min)

Purpose: Define ARD and establish why warm leads matter.

Say: ARD lets agents nominate people they already know — clients, friends, contacts — as recruiting candidates. Existing clients are our most productive source of warm leads because they already know the company, the products, and the value of an agent's guidance.

Do:

- Walk the three cards: Warm (trusted relationships, not cold calls), Faster (recruits typically trigger faster), Up to 30% (qualifying first-year FYC credited to the nominating agent).

Activity: Discussion: “In your own words, what is an ARD — and why does it matter for your recruiting strategy?” Take 2–3 responses.

Slide 3 — A Win for Everyone (5 min)

Purpose: Show the benefit from three perspectives.

Say: ARD works because everyone gains. Agents earn additional compensation, build a more productive book, and grow leadership skills. Nominated clients trigger faster, earn higher FYC, and step into a fulfilling career with a familiar face. Managers get higher-quality candidates, better retention, and stronger team production.

Do:

- Tailor your emphasis to who's in the room.

Activity: Quick poll: ask each person which of the three columns matters most to them right now. It surfaces motivation and helps you coach.

Slide 4 — ARD Delivers Real Earnings (4 min)

Purpose: Make the opportunity concrete with data.

Say: In 2021, client ARD paid out more than \$2.8M across four zones, driving 667 hires — 114 of them client hires — and the top single nominating agent earned about \$41K in overrides. Pacific South led the chart, showing what's possible when ARD is part of the culture.

Do:

- Point to the bar chart and name the leading zone.
- CONFIRM these 2021 figures against current company data before presenting; swap in the latest year if available.

Slide 5 — Step 1 — Identify the Right Candidate (6 min)


Purpose: Move from why to who.

Say: The ideal candidate is interested in building a business in financial services, wants work/life balance, and is open to a career change. Source from clients, centers of influence, family and friends, community leaders, networking affiliations, and local nonprofits.

Do:

- Widen the lens beyond just clients.

Activity: Have each person privately list two or three real names from their nest who fit the profile. They'll use these in Step 2.

 **Vyond:** Play “ARD - The Ideal Candidate” here to bring the profile to life before the activity.

Slide 6 — Step 2 — How to Ask: Conversation Starters (8 min)

Purpose: Give agents language they can use immediately.

Say: We ask for a name or an introduction — we do NOT try to sell the career in this conversation. Match the question to the agent: successor-minded agents respond to “who would you partner with?”; management-curious agents to “build your dream team”; mission-driven agents to “whose life could you change?”

Do:

- Read each conversation starter aloud and explain when to use it.

Activity: Role-play (pairs): one plays the manager asking, one plays the agent, using the names from Step 1. Swap after 3 minutes. Debrief: what felt natural, what was hard? Then discuss: when and how do you currently ask your team for ARDs?

Slide 7 — Step 3 — Build ARD Into Your Culture (6 min)

Purpose: Turn a one-off into a habit.

Say: ARD only sticks when it's routine. Make it routine (expectation from day one; built into unit meetings, PRPs, onboarding). Coach consistently (two agents per week; review their book and social contacts). Lead with trust (ask for a name, not a sale). Follow up (use pre-approved drip campaigns to build a self-sustaining pipeline).

Do:

- Walk all four practices.

Activity: Discussion: “What is one concrete way you'll build ARD into your team's culture this month?” Capture commitments aloud.

Slide 8 — Close & Commit (5 min)

Purpose: Reinforce the message and lock in action.

Say: Individual talent matters, but teamwork and intelligence win championships — ARD is how we build the team. Three next steps: write down and practice your ARD language; set goals and block weekly calendar time; encourage your team to source from their warmest relationships.

Do:

- Reminder: this material is for internal use only.

Activity: Assignment: each participant writes their ARD language in their digital workbook and commits to a weekly ARD time block before leaving.

Materials Suite

This session is supported by a connected set of materials:

- Slide deck (ARD_Overview.pptx) — 8 slides with embedded speaker notes; add morph transitions and builds as desired.
- Facilitator guide (this document).
- Prewrite worksheet — completed by participants before the session.
- Vyond clip: “ARD - The Ideal Candidate” — played at Slide 5.

For internal use only. Not for use with the public.