



Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza · 1122 Burnett St, Hatfield 0028 · Pretoria, Gauteng · South Africa

Tel: +27 12 004 8389 · Mobile: +27 65 077 6310

Email: apply@aaticd.co.za · Website: www.aaticd.co.za

COURSE BROCHURE

Agent Recruitment Planning And Management Process Training

Law, Military Science and Security / Sovereignty of the State

Unit Standard 117379 · NQF Level 6 · 30 Credits · 27 Days

COURSE OVERVIEW

This course equips learners with the knowledge and skills to effectively plan and manage the recruitment of insurance and financial services agents. It covers the entire recruitment lifecycle, from identifying staffing needs to onboarding and retention strategies, ensuring alignment with organizational goals and regulatory requirements.

Category	Law, Military Science and Security
Subfield	Sovereignty of the State
Unit Standard	117379
Accreditation	SAQA Accredited · NQF Level 6 · 30 Credits
Duration	27 days
Training Method	Online, On-Campus, In-House
Certificate	Issued via AATICD LMS – verifiable online

LEARNING OUTCOMES

- Apply recruitment planning principles to determine agent staffing needs based on business objectives and market analysis.
- Analyze recruitment sources and methods to select the most effective channels for attracting suitable agent candidates.
- Implement a structured recruitment process including screening, interviewing, and assessment of candidates.
- Evaluate the effectiveness of recruitment strategies using key performance indicators and feedback mechanisms.
- Design a comprehensive onboarding and retention plan to integrate new agents and reduce turnover.
- Demonstrate compliance with relevant legislation, codes of conduct, and ethical standards in agent recruitment.

WHO SHOULD ATTEND

- This course is designed for recruitment managers, human resources professionals, and team leaders in the insurance and financial services industry who are responsible for agent recruitment planning and management.

COURSE OUTLINE

Day 1: Introduction to Agent Recruitment Planning and Management

- Overview of the insurance and financial services industry in South Africa.
- Definition and importance of agent recruitment planning.
- Key legislation: FAIS Act, FSCA regulations, and SAQA unit standards.
- Roles and responsibilities of recruitment managers, trainers, and compliance officers.
- Ethical considerations in agent recruitment.
- Course roadmap and assessment criteria.

Day 2: Understanding the Agent Profile and Market Needs

- Components of an agent profile: experience, qualifications, soft skills.
- Market analysis techniques: demographics, geographic trends.
- Competency frameworks for financial services agents.
- Gap analysis between existing team and recruitment targets.
- Case study: profiling agents for different product lines.

Day 3: Recruitment Planning and Strategy Development

- Elements of a recruitment plan: goals, timelines, metrics.
- Sourcing channels: referrals, job portals, social media, agencies.
- Budgeting for recruitment: advertising, assessments, interviews.
- Aligning recruitment strategy with sales targets and company culture.
- Practical exercise: drafting a recruitment plan template.

Day 4: Sourcing and Attracting Potential Agents

- Crafting job descriptions and employer branding.
- Leveraging LinkedIn, Facebook, and industry-specific platforms.
- Referral programmes: design and incentives.
- Networking events and industry partnerships.
- Practical session: writing a recruitment advertisement.

Day 5: Screening and Shortlisting Candidates

- Screening criteria: minimum qualifications, experience, fit.
- Resume review techniques: red flags and key indicators.
- Pre-screening call scripts and best practices.
- Psychometric assessments and aptitude tests for agents.
- Practical exercise: screening a sample candidate pool.

Day 6: Interviewing Techniques for Agent Recruitment

- Structured interview design: competency-based questions.
- Behavioural Event Interviewing (BEI) technique.
- Role-play scenarios for sales and customer service skills.
- Interview scoring matrices and calibration.
- Legal compliance: fair labour practices and POPIA.

Day 7: Candidate Assessment and Selection

- Combining interview results, assessments, and references.
- Reference checking: questions and verification techniques.
- Background checks: credit, criminal, and regulatory checks.

- Decision-making frameworks: consensus scoring, weighted criteria.
- Record-keeping requirements under FAIS.

Day 8: Offer Management and Onboarding Preparation

- Offer letter components: salary, benefits, probation, conditions.
- Negotiation strategies for win-win outcomes.
- Onboarding checklists: documentation, training schedules.
- Pre-onboarding communication and candidate experience.
- Compliance: FSCA fit and proper requirements.

Day 9: Induction and Initial Training for New Agents

- Induction programme structure: compliance, culture, processes.
- Product training essentials: features, benefits, compliance.
- Systems training: CRM, policy administration tools.
- Performance expectations: KPIs, sales targets, behaviour standards.
- Mentorship programmes: selection and training of mentors.

Day 10: Performance Management and Monitoring

- Key performance indicators: sales volume, conversion rates, customer satisfaction.
- Performance dashboards and reporting tools.
- Feedback techniques: constructive, timely, specific.
- Performance improvement plans (PIPs) and coaching.
- Analytics for early warning signs of attrition.

Day 11: Coaching and Development for Agents

- Coaching models: GROW, situational leadership.
- Adult learning principles: andragogy, experiential learning.
- Skill gap analysis and training needs assessment.
- Creating individual development plans (IDPs).
- Practical coaching role-plays and feedback.

Day 12: Retention Strategies for Agents

- Causes of agent turnover: compensation, support, growth.
- Recognition programmes: awards, incentives, public acknowledgment.
- Career pathing: advancement opportunities and training.
- Employee engagement surveys and action planning.
- Exit interviews: gathering insights to improve retention.

Day 13: Regulatory Compliance and Ethical Recruitment

- FAIS fit and proper requirements: qualifications, experience, honesty.
- Employment Equity Act: affirmative action, diversity.
- POPIA: candidate data protection and consent.
- Code of conduct for recruitment: transparency, fairness.
- Record-keeping: documentation retention and access.

Day 14: Diversity and Inclusion in Agent Recruitment

- Business case for diversity in financial services.
- Unconscious bias training and mitigation strategies.
- Inclusive job advertising: language, channels, accessibility.
- Diverse interview panels and standardised processes.

- Diversity metrics: representation, retention, inclusion scores.

Day 15: Technology and Tools for Recruitment Management

- Overview of ATS features: job posting, resume parsing, reporting.
- CRM for recruitment: candidate relationship management.
- Automation tools: email templates, interview scheduling.
- Data analytics: source effectiveness, time-to-hire, cost-per-hire.
- Cybersecurity and data privacy considerations.

Day 16: Budgeting and Resource Management for Recruitment

- Budget components: advertising, assessments, travel, technology.
- Cost-per-hire calculation and benchmarking.
- ROI analysis: comparing source effectiveness and quality of hire.
- Resource allocation: balancing internal vs. external recruitment.
- Practical exercise: building a recruitment budget spreadsheet.

Day 17: Stakeholder Management and Communication

- Stakeholder mapping: sales managers, HR, compliance, finance.
- Communication channels: meetings, reports, dashboards.
- Managing expectations: timelines, candidate quality, challenges.
- Conflict resolution: aligning priorities and resolving disagreements.
- Regular reporting: recruitment metrics and updates.

Day 18: Continuous Improvement and Best Practices

- Recruitment process audits: identifying bottlenecks and inefficiencies.
- PDCA cycle: planning changes, implementing, monitoring, adjusting.
- Industry benchmarks: time-to-fill, quality of hire, candidate experience.
- Innovation trends: gamification, AI screening, virtual reality.
- Case studies of successful recruitment transformations.

Day 19: Integration and Capstone Project

- Capstone project brief: design a full recruitment plan for a target market.
- Components: profile, sourcing, screening, selection, offer, onboarding.
- Presentation skills: structuring and delivering a professional pitch.
- Peer review: constructive feedback and collaborative learning.
- Final Q&A; and consolidation of key concepts.

Day 20: Assessment, Certification, and Action Planning

- Final written assessment: multiple choice, case study, and essay.
- Practical assessment: role-play or presentation.
- Feedback session: strengths, areas for improvement.
- Action plan template: goals, resources, timelines.
- Certification ceremony and closing remarks.

ASSESSMENT & CERTIFICATION

Delegates are assessed through exercises and a final test. A mark of **50% or above** earns an **AATICD Certificate of Completion**, issued digitally with a unique verification code. This course carries **30 NQF credits** at **NQF Level 6**.

PRICING (PER DELEGATE, EX-VAT)

Delegates	Training Method	Price per Delegate	Total
1	Online	R 87,300.00	R 87,300.00
1	In-House	R 113,500.00	R 113,500.00
1	On-Campus (Pretoria)	R 131,000.00	R 131,000.00

UPCOMING SESSIONS

Start	End	Method	Venue
10 Aug 2026	15 Sep 2026	On-Campus	Pretoria, South Africa
11 Aug 2026	16 Sep 2026	On-Campus	Abu Dhabi, UAE
12 Aug 2026	17 Sep 2026	On-Campus	Durban, South Africa
12 Aug 2026	17 Sep 2026	On-Campus	Mauritius
13 Aug 2026	18 Sep 2026	On-Campus	Cape Town, South Africa
14 Aug 2026	21 Sep 2026	On-Campus	Dubai, UAE
17 Aug 2026	22 Sep 2026	On-Campus	Abu Dhabi, UAE
18 Aug 2026	23 Sep 2026	On-Campus	Durban, South Africa

Contact us if no suitable date is listed – on-demand sessions can be arranged for groups.

HOW TO GET A QUOTE OR APPLY

- 1. Get an instant quotation online:** visit www.aaticd.co.za, open the page for this course (Unit Standard 117379) and click **Get A Quote / Apply**. Select your training method and number of delegates – your quotation is generated immediately and emailed to you with the course brochure attached.
- 2. Apply by email:** send the course title, your preferred training method (Online, In-House or On-Campus Pretoria), the number of delegates and your preferred dates to apply@aaticd.co.za – our team will reply with a formal quotation.
- 3. Apply by phone or WhatsApp:** call +27 12 004 8389 or WhatsApp +27 65 077 6310 and we will prepare your quotation and reserve your seats.
- 4. Confirm your booking:** accept the quotation and settle the invoice. As soon as payment is confirmed your delegates are enrolled and receive their AATICD LMS login details by email, along with joining instructions for their chosen training method.

Group discounts apply automatically – the more delegates you enrol, the lower the price per delegate. No payment is required to request a quotation.

Accredited Africa Training Institute for Capacity Development

Unit FO409, Hatfield Plaza, 1122 Burnett St, Hatfield 0028, Pretoria, Gauteng, South Africa
Tel: +27 12 004 8389 · WhatsApp: +27 65 077 6310 · apply@aaticd.co.za · www.aaticd.co.za