



## Accredited Africa Training Institute for Capacity Development

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

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### COURSE BROCHURE

# Agent Program Planning And Management Training

Law, Military Science and Security / Sovereignty of the State

Unit Standard 117380 · NQF Level 6 · 8 Credits · 5 Days

## COURSE OVERVIEW

This course equips learners with the skills to plan, implement, and manage agent programs effectively within an organisational context. It focuses on strategic alignment, resource allocation, and performance monitoring to achieve program objectives. Learners will gain practical tools to coordinate agency activities and ensure compliance with relevant policies.

|                 |                                           |
|-----------------|-------------------------------------------|
| Category        | Law, Military Science and Security        |
| Subfield        | Sovereignty of the State                  |
| Unit Standard   | 117380                                    |
| Accreditation   | SAQA Accredited · NQF Level 6 · 8 Credits |
| Duration        | 5 days                                    |
| Training Method | Online, On-Campus, In-House               |
| Certificate     | Issued via AATICD LMS – verifiable online |

## LEARNING OUTCOMES

- Analyse the strategic context and objectives of an agent program to inform planning decisions.
- Design a comprehensive agent program plan incorporating timelines, resources, and risk management.
- Implement the agent program by coordinating activities, stakeholders, and communication channels.
- Evaluate program performance against defined metrics and adjust strategies as needed.
- Demonstrate compliance with organisational policies and regulatory requirements throughout the program lifecycle.
- Apply effective leadership and management techniques to guide agent teams toward program goals.

## WHO SHOULD ATTEND

- This course is designed for managers, team leaders, and professionals responsible for planning and overseeing agent programs in corporate or agency settings.
- It is also suitable for individuals aspiring to take on program coordination roles.

## COURSE OUTLINE

### Day 1: Foundations of Agent Program Planning

- Introduction to agent program management
- Overview of the insurance and financial services landscape
- Regulatory environment: FAIS Act, FSCA requirements
- Stakeholder identification and role clarification
- Setting program goals and objectives
- Key elements of a program plan
- Case study: Successful agent program in a South African context

### Day 2: Agent Recruitment, Selection, and Onboarding

- Recruitment planning and sourcing channels
- Competency frameworks for agents
- Selection methods: interviews, assessments, background checks
- Compliance: FSCA fit and proper requirements
- Onboarding programme structure and content
- Induction and initial training integration
- Practical exercise: Designing a recruitment plan

### Day 3: Training, Development, and Performance Management

- Training needs analysis and curriculum design
- Product knowledge, sales skills, and compliance training
- Performance management frameworks and KPIs
- Setting performance targets and review cycles
- Coaching and mentoring techniques
- CPD requirements under FSCA
- Role-play: Performance review meeting

### Day 4: Compensation, Motivation, and Retention Strategies

- Compensation models: commission, bonuses, and benefits
- Designing incentive programmes and sales contests
- Motivation theories and practical application
- Retention strategies: career pathing, recognition, support
- Compliance considerations in compensation
- Data analysis: measuring retention and turnover
- Group activity: Creating a compensation plan

### Day 5: Programme Evaluation, Compliance, and Continuous Improvement

- Programme evaluation methods: surveys, metrics, audits
- Regulatory compliance monitoring and reporting
- Continuous improvement cycle: Plan-Do-Check-Act
- Handling non-compliance and corrective actions
- Technology tools for programme management
- Final project: Presenting a comprehensive agent programme plan
- Course wrap-up and certification

## 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 **8 NQF credits** at **NQF Level 6**.

## PRICING (PER DELEGATE, EX-VAT)

| Delegates | Training Method      | Price per Delegate | Total       |
|-----------|----------------------|--------------------|-------------|
| 1         | Online               | R 25,300.00        | R 25,300.00 |
| 1         | In-House             | R 32,900.00        | R 32,900.00 |
| 1         | On-Campus (Pretoria) | R 38,000.00        | R 38,000.00 |

## UPCOMING SESSIONS

| Start       | End         | Method    | Venue                   |
|-------------|-------------|-----------|-------------------------|
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Durban, South Africa    |
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Abu Dhabi, UAE          |
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Pretoria, South Africa  |
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Dubai, UAE              |
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Cape Town, South Africa |
| 10 Aug 2026 | 14 Aug 2026 | On-Campus | Mauritius               |
| 17 Aug 2026 | 21 Aug 2026 | On-Campus | Dubai, UAE              |
| 17 Aug 2026 | 21 Aug 2026 | On-Campus | Pretoria, 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](http://www.aaticd.co.za), open the page for this course (Unit Standard 117380) 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](mailto: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.

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