2013 Training and Development Curriculum

HR Leadership, Talent and Development

Introduction

- **The Calendar takes into consideration the most common learning needs as identified in the Philam Group's IDPs.**

- **While we still offer many of the core training programs, we have new offerings as well that are aimed at helping everyone in the organization develop the CRITICAL CAPABILITIES that help drive our Business Strategies, and on which everyone is also evaluated at the end of the year.**

- **Please expect possible changes to the calendar within the course of the year, as we will also be taking into consideration other learning needs still to be identified in the 2013 IDPs, as well as roll-out upcoming training initiatives from the region.**

- **Please notice as well that we are starting to bring some training programs closer to our Vismin participants; this is part of our efforts to improve our services, as well as maximize training budgets in providing more relevant trainings to more employees.**

- **Finally, to continuously improve our training management, please also expect changes in our processes for training registration and evaluation. (Please check out the appropriate sections on these in this calendar.) We trust these changes will help make our training offerings even more effective, efficient, and truly helpful in meeting our organization's required capabilities and each employee's development needs.**

- # I WANT TO SEE THE…

Monthly Calendar

Program List

Training Process

Agreements

January 2013

Monday	Tuesday	Wednesday	Thursday	Friday
	1 New Year's Day	2	3	4
7	8	9 AIA Manager Programme (Cebu)	10	11 Professional Image Enhancement Training
14	15	16	17	18 Cascade of e-performance / IDPs Finance 101
21 AIA Manager Programme (UN Ofc)	22 Cascade of e-performance/ IDPs New Employee Orientation Program	23 AIA Manager Programme (UN Ofc)	24	25 Gallup and E-Perf Cascade (Cebu)
28	29	30	31	

February 2013

Monday	Tuesday	Wednesday	Thursday	Friday
				1 Gallup and E-Perf Cascade (Davao)
4	Market Research, Segmentation, Targeting & Positioning	**6**	**7**	BGC Orientation / Insurance Knowledge
		Gallup Train the Trainers Workshop for Champions		
BGC Orientation **11**	**12**	BGC Orientation **13**	**14**	BGC Orientation
		Gallup Workshop for Line Managers		
	Problem Solving and Decision Making Training			
18 New Employee Orientation Program / BGC Orientation	**19**	**20** BGC Orientation	**21**	**22** BGC Orientation
	AIA Manager Programme (FGU Makati)			
25	**26**	**27**	**28**	
People Power Day		BGC Orientation		

March 2013

Monday	Tuesday	Wednesday	Thursday	Friday
				Deadline of eLearning: Prevention of Insider Trading Certification; and AIA Code of Conduct BGC Orientation
4 New Employee Orientation Program BGC Orientation	**5**	**6** Advanced Powerpoint BGC Orientation	**7** Coaching Skills Training	**8** BGC Orientation
11 BGC Orientation	**12**	**13** BGC Orientation	**14**	**15** BGC Orientation
18 Basic Investment Knowledge	**19**	**20** MS Excel Training	**21**	**22**
25	**26**	**27**	**28** Maundy Thursday	**29** Good Friday

April 2013

Monday	Tuesday	Wednesday	Thursday	Friday
1	**2**	**3** Project Management	**4**	**5**
8	**9** Araw ng Kagitingan	**10**	**11**	**12**
15	**16**	**17**	**18** New Employee Orientation Program	**19**
22	**23**	**24**	Effective Presentation Skills AIA Manager Programme (FGU Makati)	
29	**30** Professional Image Enhancement Training			Deadline of eLearning: Price Sensitive Information

May 2013

Monday	Tuesday	Wednesday	Thursday	Friday
		1 Labor Day	**2**	**3**
6	**7** LOMA Mock Exam	**8** Negotiation Skills training	**9**	**10**
13 Election	**14**	**15**	**16**	**17**
20	**21**	Finance 101	**23**	**24**
		7 Habits of Highly effective People		
27 AIA Manager Programme (Net Lima)	**28**	**29**	**30**	
		LOMA Spring Examination		

June 2013

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5	6	7

LOMA Spring Examination

Mid-year ePerf Cascade

Mid-year ePerf Cascade

Advanced Powerpoint

Service Excellence

Independence Day

New Employee Orientation Program

Monday	Tuesday	Wednesday	Thursday	Friday
17	18	19	20	21

AIA Manager Programme Kamustahan

Microsoft Outlook

Effective Leadership skills:
Leading in the Speed of Trust

Monday	Tuesday	Wednesday	Thursday	Friday
24	25	26	27	28

Strategic Planning

Effective Business Writing

MS Excel Training

July 2013

Monday	Tuesday	Wednesday	Thursday	Friday
1	**2**	**3**	**4**	**5**
New Employee Orientation Program		MS Excel Training		
8	**9**	**10**	**11**	**12**
	Basic Investment Knowledge	Project Management		
15	**16**	**17**	**18**	**19**
AIA Manager Programme (Net Lima)		Assertive Communication		
22	**23**	**24**	**25**	**26**
Effective Presentation skills		Adobe Photoshop		
			Coaching Skills	
29	**30**	**31**		

August 2013

Monday	Tuesday	Wednesday	Thursday	Friday
			1	2
5	6	7	8	9
New Employee Orientation Program			Insurance Knowledge	
12	13	14	15	16
	Effective Leadership skills: Leading in the Speed of Trust		AIA Manager Programme (Net Lima) Project Management	
19	20	21	22	23
Six Sigma Executive Overview		Ninoy Aquino Day	Effective Business Writing	
26	27	28	29	30
National Heroes' Day				Deadline of eLearning: AMLA and Data Privacy

September 2013

Monday	Tuesday	Wednesday	Thursday	Friday
2	**3**	**4**	**5**	**6**
New Employee Orientation Program				
9	**10**	**11**	**12**	**13**
Advanced Powerpoint	Negotiation Skills Training		Excel Training	
16	**17**	**18**	**19**	**20**
Coaching Skills Training		Project Management		
23	**24**	**25**	**26**	**27**
Effective Leadership skills: Leading in the speed of trust	AIA Manager Programme (Net Lima)		LOMA Mock Exam	
30				
Deadline of eLearning: Fraud Awareness; and Email Data Loss Prevention				

October 2013

Monday	Tuesday	Wednesday	Thursday	Friday
	1	2	3	4
	7 Habits of Highly effective People			Manager as Coach Programme
7	8	9	10	11
New Employee Orientation Program			PDCA/ Kaizen	
14	15	16	17	18
Meeting Advantage	Service Excellence		Risk Management	Effective Business Writing
21	22	23	24	25
Powerful Presentation		Problem Solving		
	LOMA Fall Examination			
28	29	30	31	

November 2013

Monday	Tuesday	Wednesday	Thursday	Friday
4 New Employee Orientation Program	**5**	**6**	**7**	**8**
11	**12**	**13**	**14**	**15**
18	**19**	**20**	**21**	**22**
25	**26**	**27**	**28**	**29**

MAIN MENU   **CALENDAR**

December 2013

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
	New Employee Orientation Program			
9	10	11	12	13
MS Excel Training			Basic Investment Knowledge	
16	17	18	19	20
Effective Business Writing				
23	24	25	26	27
		Christmas Day		
30	31			
Rizal Day	New Year's Eve			

MAIN MENU   CALENDAR

Program List

TRAINING FRAMEWORK

In line with our operating philosophy of doing the right thing, in the right way, with the right people, we are putting particular emphasis on the development of the CRITICAL CAPABILITIES that help drive our Business Strategies, and on which everyone is evaluated at the end of the year.

(Please click on the red boxes to see the trainings offered to help develop each Critical Capability)

Doing the Right Thing (Business Focus)	**In the Right Way (Executive Focus)**	**With the Right People (People Focus)**
The ability to contribute to AIA's and Philamlife's vision and strategic objectives.	*The ability to make decisions, make positive changes, and deliver results.*	*The ability to connect with people and build teams.*

MAIN MENU

DOING THE RIGHT THING (Business Focus)

- Understanding Our Company and the Industry

PROGRAMS	PARTICIPANT	DESCRIPTION
NEW EMPLOYEE ORIENTATION PROGRAM (NEOP)	All	**Introduces AIA and the Philam Group to the new hires; helps them appreciate our strength as a company, understand our current goals and objectives, and be excited for our future. In particular, discusses AIA and Philam' s history, VMV, Operating Philosophy, org'l structure, products overview, and basic insurance operations.**
PHILAM FINANCIALS 101	All	**Helps employees understand our business metrics, and the most common financial terms used in the company. Most importantly, helps employees understand how they contribute to the Company's bottomline results.**
LIFE OFFICE MGT ASSOCATION (LOMA) Courses (*online*)	All	**A series of qualifying courses for insurance professionals, leading up to FLMI certifications, depending on the tracks pursued. (For more information, please read our FLMI Education Policy.)**

DOING THE RIGHT THING (Business Focus)

- Understanding Our Products, and promoting financial literacy

PROGRAMS	PARTICIPANT	DESCRIPTION
PAL PRODUCTS ORIENTATION	All	**Helps employees know and appreciate the products offered by PAL, and how these can be availed of.** (Note: Schedules for these trainings may vary from actual calendar sked, as we will be following the training sked confirmed by our Sales Team monthly.)
PAMI PRODUCTS ORIENTATION	All	**Helps employees know and appreciate the products offered by PAMI, and how these can be availed of.**
INVESTMENTS KNOWLEDGE	All	**Introduces participants to the practice of investing.**

DOING THE RIGHT THING (Business Focus)

- Thinking and Planning Strategically

PROGRAMS	PARTICIPANT	DESCRIPTION
STRATEGIC PLANNING	MCs, LMs, Executives	**Designed to develop the best strategic planning to support the company's goals. This course is designed to combine proven-by-practice methods with new insights and ideas from a wide range of current strategic thinking.**
EFFECTIVE MGT SKILLS: PERFORMANCE MGT - APPRAISERS	LMs and Executives	**Provides an introductory/refresher course on the company's goals-setting processes, helps participants set clear, easily measurable goals that are in line with the department and the company's goals, and helps participants guide their direct reports in aligning their goals as well.**
PERFORMANCE MGT - APPRAISEES	PGs (Staff) and MCs (Managers who are not handling People)	**Provides an introductory/refresher course on the company's goals-setting process, helps participants set clear, easily measurable goals that are in line with the department and the company's goals, and helps manage performance in line with these goals.**

DOING THE RIGHT THING (Business Focus)

- Understanding Business Requirements

PROGRAMS	PARTICIPANT	DESCRIPTION
CORPORATE GOVERNANCE	VPs and Up	**Helps the company's top management understand the accountabilities of all stakeholders in the company, and understand regulatory and market mechanisms governing our business.**
BASIC BUDGETING PROCESS	MCs, LMs, Executives	**Develops skills in forecasting and evaluating financial expenditures and understanding how these impact the business; orients participants on the budgeting processes of the company.**

IN THE RIGHT WAY (Executive Focus)

- Demonstrating and Promoting Accountability and Trust at Work

PROGRAMS	PARTICIPANT	DESCRIPTION
EFFECTIVE LEADERSHIP SKILLS: LEADING AT THE SPEED OF TRUST	MCs, LMs, Executives	**Engages leaders into strengthening trust in the workplace for greater influence, and for accelerating coordination and collaboration in the workplace. Helps participants Identify trust gaps in the workplace, and equips them with skills for addressing this. Focus is on minimizing or eliminating "Trust Taxes", and building and reaping "Trust Dividends".**
THE 7 HABITS OF HIGHLY EFFECTIVE PEOPLE (FOR MANAGERS)	MCs, LMs, Executives	**Presents a compelling mindsetting framework for developing personal and interpersonal effectiveness, based on Stephen Covey's highly-recommended 7 Habits book.**
AIM HIGH: PERSONAL EXCELLENCE IN THE WORKPLACE	PGs (Staff)	**Discusses 4 powerful insights for personal effectivity at work; helps participants develop consciousness for excellence (vis-à-vis mediocrity), and provides them with tools to positively influence others as well as sustain lasting results.**

IN THE RIGHT WAY (Executive Focus)

 - **Demonstrating passion for excellence at work by making sound decisions and focusing on continuous improvement.**

PROGRAMS	PARTICIPANT	DESCRIPTION
PROBLEM-SOLVING AND DECISION-MAKING	MCs, LMs, Executives	**Develops skills in systematically analyzing problems and coming up with the best decisions, taking into consideration all pertinent critical factors.**
PDCA: A TOOL FOR CONTINUOUS IMPROVEMENT	PGs (Staff)	**Equips participants with the PDCA (Plan-Do-Check-Act) Tool for effectively and systematically identifying improvement opportunities, and carrying them through to completion.**
SIX SIGMA OVERVIEW	MCs, LMs, Executives	**Provides an introductory overview of the Six Sigma improvement processes. Also discusses the basic statistical methods used within this framework.**

IN THE RIGHT WAY (Executive Focus)

- Effectively managing teams and changes in the workplace

PROGRAMS	PARTICIPANT	DESCRIPTION
EFFECTIVE MGT SKILLS: MANAGING FOR IMPROVED PERFORMANCE	LMs and Executives	**Develops skills in handling a direct report's performance difficulties, guiding him to personally commit to improvements, with emphasis on maintaining good working relationships throughout the process.**
EFFECTIVE MGT SKILLS: REINFORCING GOOD PERFORMANCE	LMs and Executives	**Develops skills in effectively reinforcing continued good performance, and even encouraging even more stellar work.**
EFFECTIVE MGT SKILLS: MANAGING CHANGE	LMs and Executives	**Develops skills in helping manage team's acceptance of needed changes in the workplace, and ensure their buy-in and commitment to the changes.**

PHILAM LIFE
An AIA Group Company

IN THE RIGHT WAY (Executive Focus)

- Delivering Results In Day-to-Day Interactions

PROGRAMS	PARTICIPANT	DESCRIPTION
BEING ASSERTIVE IN DAY-TO-DAY NEGOTIATIONS	LMs and Executives	**Equips participants with practical tools to manage each negotiation – leading to the creation of a natural structure that creates lasting commitment.**
MEETING MANAGEMENT	LMs and Executives	**Develops skills in managing meetings to ensure meeting objectives are met through the most efficient use of time and effective involvement of all concerned parties.**
EFFECTIVE PRESENTATION SKILLS	LMs and Executives	**Develops skills in crafting impactful professional presentations that meet objectives; also includes a module on reviewing AIA-compliant presentation tools. Equally important, helps participants develop abilities to manage self and the audience during actual presentations.**
EFFECTIVE BUSINESS WRITING	LMs and Executives	**Develops skills in producing effective business writing in all areas of business: proposal writing, reports, letters and emails.**

IN THE RIGHT WAY (Executive Focus)

- Delivering Results (cont.)

PROGRAMS	PARTICIPANT	DESCRIPTION
SERVICE EXCELLENCE	Frontliners – PGs to MCs	**Cultivates a consciousness for service excellence, and develops actual skills in exceeding customer expectations using the internationally-reknowned DDI service framework of meeting customer's expressed and hidden needs, and turning encounters with irate customers into extraordinary service opportunities.**
PROJECT MANAGEMENT	MCs and LMs	**Helps participants understand the language, principles and core tools and techniques required for successful project management.**
COMMUNICATING WITH IMPACT	All	**Equips participants with practical communication techniques to enhance their working relationships and business success.**

PHILAM LIFE
An AIA Group Company

IN THE RIGHT WAY (Executive Focus)

- Delivering Results (through effective use of MS Office tools)

PROGRAMS	PARTICIPANT	DESCRIPTION
MS EXCEL TRAINING	All	Enhances participants' skills in the use of MS Excel.
MS WORD TRAINING	All	Enhances participants' skills in the use of MS Word.
MS POWERPOINT TRAINING	All	Enhances participants' skills in the use of MS Powerpoint.
MS OUTLOOK TRAINING	All	Enhances participants' skills in the use of MS Outlook.
ADOBE PHOTOSHOP TRAINING	All	Introduces participants to the basics of Adobe Photoshop for the creation of simple collatorals at work.
MANAGING DATABASES USING MS EXCEL	All	Focuses on the use of MS Excel in the maintenance and handling of large databases.
CREATING FORMS USING MS EXCEL AND WORD	All	Focuses on the use of MS Excel and MS Word in the creation of, administration, and handling of survey forms and all other kinds of common forms used at work.

MAIN MENU   PROGRAM LIST   Next

WITH THE RIGHT PEOPLE (People Focus)

- Developing and Nurturing Positive Interpersonal and Team Relations

PROGRAMS	PARTICIPANT	DESCRIPTION
MBTI: A TOOL FOR SELF-DISCOVERY AND UNDERSTANDING OTHERS	All	**Helps participants gain a better understanding of themselves and others through the MBTI profiling tool. Equips them with skills in dealing with others, based on their MBTI profiles.**
EFFECTIVE LEADERSHIP: MOTIVATING YOUR TEAM	All	**Discusses proven ways with which other companies have made formal and informal recognition programs work for them, thereby increasing employee morale and engagement.**
MANAGER AS COACH PROGRAMME	Local Exco Members and Key Managers	**Helps maximize potential, and harness the ongoing commitment and energy needed to meet personal and professional goals.**
COACHING SKILLS TRAINING	LMs (not included in Manager as a Coach Programme)	**Helps maximize potential, and harness the ongoing commitment and energy needed to meet personal and professional goals.**

WITH THE RIGHT PEOPLE (People Focus)

- Developing and Nurturing Positive Interpersonal and Team Relations

PROGRAMS	PARTICIPANT	DESCRIPTION
THE AIA MANAGER	AVPs, Executives	**Designed to develop our line managers to be effective managers to the team; to understand the importance of engaging staff to increase loyalty, retain talents and yield higher productivity; to develop a culture of great management across the AIA Group to optimize business performance; to equip manager with the knowledge and skills required to be a great manager**
PROFESSONAL IMAGE ENHANCEMENT	PGs (Staff) to LM3	**Designed to imbibe to employees that what they wear and how they use colors will make a difference in their visual appearance, confidence and the achievement of their personal and business goals; to help our employees to dress smart at a controlled budget, gain a good first impression while getting themselves dressed every single day in pleasure.**

Training Process

TRAINING REGISTRATION

- HR will consolidate all learning needs from the IDPs, and will AUTOMATICALLY send a calendar invitation to those who identified the calendared trainings in their IDPs.

- The calendar invitation will contain all basic details about the training, and the employee will be asked to enroll in any of the run dates scheduled for the training (if there are more than 1 runs).

- Participants will be confirmed on a first-come-first-served basis. If the number of enrollees exceeded the maximum no. for the class size, said enrollees will be notified, and will be asked to pick another run date.

TRAINING EVALUATION

1st Level Evaluation

⬆ Participants will be asked to fill out a Training Evaluation Form at the end of every training program. To be evaluated will be the trainee's over-all satisfaction with the program, and his ratings and feedback on the course content, trainer/s, and training administration.

⬆ The Training Report generated from the evaluation forms will be used to continuously improve the course and training administration. A copy of the report will also be given to the trainer.
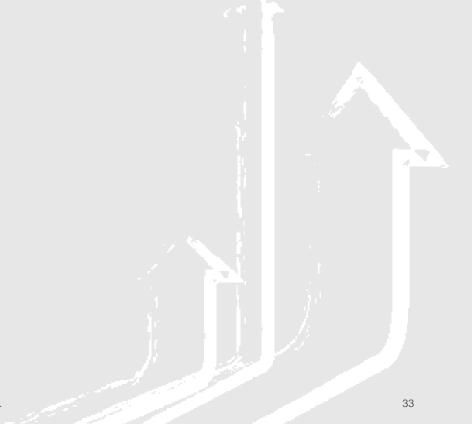
2nd Level Evaluation

⬆ To help ensure actual transfer of learning to the workplace, enrolled participants will be asked to fill up a Learning Plan prior to attending the training.

⬆ In said Learning Plan, the employee will determine his specific objectives for attending the training, and will identify **at least 1 actual work application** of the learning he is expected to gain from the course.

⬆ After 1-2 months from attending the training program, participants will be asked to give feedback re. the status of their Learning Plans, and how they were able to apply what they have learned back at the workplace.

Agreements

PROGRAM CONFIRMATION

• A **MINIMUM CLASS SIZE OF 12** is needed in order to confirm an onsite program; otherwise participants will attend public runs. Exceptions to this clause are the NEOP.

DEMONSTRATING 'MALASAKIT' vs. NO SHOW

• For and in consideration of the training cost, employees shall do their best to satisfactorily complete and meet the necessary standards of competence and proficiency for the training, else the **100% of the TRAINING COST** will be charged to the employees' office codes.

• Cancellation costs will not be charged if the following reasons apply: accidents, death within the family, or critical maternity or health conditions

PROGRAM COMPLETION

• A Certificate of Completion will be awarded to participants who complete **100%** of the training program.

MAIN MENU

FAQs

FAQs

I received a calendar training invitation. Does this mean I can already SIGN UP for the training?

Not immediately. Please coordinate first with your immediate superior so you can both agree on your schedule. We are sending you the calendar invite (and not to your boss), because we encourage you to take personal responsibility for your own development.

I noticed a colleague received a calendar training invitation for a training I also have in my IDP. Why didn't I receive an invitation?

We prioritize inviting participants who have the training among their TOP 2 learning needs for each training category. enrollees; otherwise, it will be postponed to a later date.

Is there a minimum no. of CLASS SIZE for the trainings?

Yes. A run should have at least 12 confirmed enrollees; otherwise, it will be postponed to a later date. An exception to this is the NEOP.

MAIN MENU

I was LATE IN SUBMITTING MY ENROLLMENT and didn't meet the cut-off. What happens next?

You will be asked to enroll in the next run/s of the same training.

I want to join the training, but IT'S NOT IN MY IDP.

You are still welcome to enroll, but subject to our evaluation if indeed said training is relevant and significant to your function; and we will have to put you on waitlist. Our priority shall be those who have the training in their IDPs. If we can accommodate more participants after the cut-off, then we will confirm your slot in the training.

MAIN MENU

I have a confirmed enrollment, but due to work I have to withdraw my participation in the training. WILL I BE CHARGED? HOW MUCH?

If you cancelled your enrollment at least 7 working days prior to the actual training run, you will not be charged. Otherwise, we will have to charge your department the commensurate cost of your supposed-to-be participation in the training.

The cost will depend on the ACTUAL training cost incurred for the training. This will include costs for the trainer's fee (if the training was conducted by an external facilitator/consultant), training materials (as applicable), meals/snacks, and rent for the training venue (as applicable).

Cancellation of participation for valid/emergency reasons will be dealt with on a case-to-case basis, subject to discussions with the participant and his immediate superior.

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MAIN MENU

Thank You