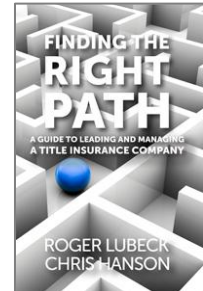


Finding the Right Path:

A Guide to Leading and Managing a Title Insurance Company

After 20 years consulting in the Title Insurance Industry, Roger Lubeck and Chris Hanson from Corporate Behavior Analysts, Ltd., share their insights on why leadership and management are critical to successful development and change in title companies. Using examples specific to the title industry, the authors explore why leading and managing a title company requires unique skills different from other types of professional businesses.



Finding the Right Path includes chapters on assessing the strengths and weaknesses of a title company, setting direction, industry metrics, team development, factors affecting work and employee culture, first time managers, influencing employee behavior, setting expectations and standards, coaching and problem solving, why meetings are important, and making change practical. The Title Industry is facing a decade of dramatic change. Lubeck and Hanson make a convincing case that the leadership and management principles and practices presented in their book will be essential to leading and managing the change.

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CORPORATE BEHAVIOR ANALYSTS, Ltd.

Corporate Behavior Analysts, Ltd. (CBA) is a Chicago based consulting firm providing leadership and management development. Founded in 1998 by Chris Hanson and Roger Lubeck, CBA has worked with hundreds of independent title insurance agents, the two largest title insurance underwriters, and numerous Land Title Associations. As national speakers and experts on leading title insurance companies, Roger and Chris have consulted with companies in more than fifty cities in over thirty states.



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Roger Lubeck, Ph.D. is President of Corporate Behavior Analysts, Ltd, and has over 30 years of consulting experience in real estate services, healthcare, higher education, manufacturing, and mental health. Roger has a Ph.D. degree in Experimental Psychology from Utah State University and degrees in Behavioral Psychology from Western Michigan University. In his career, Roger has been a business consultant, workshop leader, retreat facilitator, public speaker, speechwriter, assistant professor, researcher, parent trainer, and dogcatcher. Roger is married to Lynette Chandler, a University Professor and author. Roger is the author of two published novels and a number of publications on customer service, leadership, management, marketing, and sales.



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Acknowledgements about CBA:

“University Title Company’s success today is because of practices and vision learned from working with CBA.” Celia Goode-Haddock, Chairman of the Board/CEO of University Title Company, College Station, Texas.

“Engaging CBA was a turning point for Prairie Title. Roger and Chris do not come into an organization with bold promises to fix it. Instead, they teach their clients how they should think about running their businesses.” Frank Pellegrini. CEO. Prairie Title, Oak Park, Illinois.

“The workshops and programs presented by CBA throughout the country have helped hundreds of independent agents meet the challenges brought about by the dynamic changes facing the title industry. Many agents consider CBA to be their ‘silent partner!’” George ‘Mike’ Ramsey, retired in December of 2010 after 44 years in the title industry. He was a Regional Vice President and Agency Manager for Chicago and Fidelity National Title.

Finding the Right Path: A Guide to Leading and Managing a Title Insurance Company
Quotes from each chapter

- Chapter 1: FINDING THE RIGHT PATH. *Without leadership there is no change.*
- Chapter 2: THE BUSINESS OF TITLE INSURANCE. *Leading and managing a title insurance company is different from many small businesses.*
- Chapter 3: ASSESSING YOUR ORGANIZATION. *Many title companies do not know where they are headed and even when they do, they do not have a plan to get there.*
- Chapter 4: SETTING CLEAR DIRECTION. *If a company is not capable of developing a visionary culture, it is better starting off by developing measurable goals.*
- Chapter 5: MEASURES AND METRICS. *Labor ratio (labor expense / gross revenue) is the single most important factor in determining the health and profit of a title company.*
- Chapter 6: DEVELOPING YOUR TEAM. *The power of a team is shown by what the group can accomplish as a whole and the assistance they can lend each other.*
- Chapter 7: EMPLOYEE CULTURE. *Creating and maintaining good morale is a key to a company's success.*
- Chapter 8: STARTING TO MANAGE. *Acquiring technical knowledge and skills seldom prepare an employee to manage successfully.*
- Chapter 9: INFLUENCING BEHAVIOR. *In order for employees to improve and change, they need positive consequences for their behavior.*
- Chapter 10: SETTING EXPECTATIONS. *You can never provide too much communication to your employees.*
- Chapter 11: SUPPORTIVE COACHING. *We use constructive feedback to focus on behavior and results that needs to be improved or changed.*
- Chapter 12: MANAGING PROBLEMS. *If you measure it, they do it.*
- Chapter 13: WHY MEETINGS ARE IMPORTANT. *Conducting effective meetings should be a part of every manager's basic skill set.*
- Chapter 14: MAKING CHANGE PRACTICAL. *In very successful companies, innovation and change are a way of life.*



Finding the Right Path: A Guide to Leading and Managing a Title Insurance Company

Main sections in each chapter

CHAPTER 1: FINDING THE RIGHT PATH

Aspects about leadership and management that are common to any business and why leading and managing a title company requires unique skills, experience, and knowledge.

- The Expectations of Leaders
- Leadership Style
- The Primary Job of the Manager
- Finding Your Path

CHAPTER 2: THE BUSINESS OF TITLE INSURANCE

What sets the title insurance industry apart from other insurance; what makes managing in the title industry different from other types of professional businesses.

- The Title Insurance Industry
- Different Types of Insurance
- Consumer Disconnect
- An Industry in Need of Professional Standards
- Employee Training
- Management Training

CHAPTER 3: ASSESSING YOUR ORGANIZATION

Assessing the strengths and weaknesses of your business and comparing your company to the threats and opportunities in your market.

- Performing an Organizational Review
- Assessing Leadership and Direction

CHAPTER 4: SETTING CLEAR DIRECTION

Key business concepts companies have used to establish or refine their overall direction.

- Business Drivers
- Values
- Vision, Mission and Goals

CHAPTER 5: MEASURES AND METRICS

Critical measures and metrics for leading and managing a title insurance company.

- Financial Measures
- Operational Measures

CHAPTER 6: DEVELOPING YOUR TEAM

How to develop your management team and your work teams.

- Management Team Structure and Process
- Developing Work Teams

CHAPTER 7: EMPLOYEE CULTURE

An examination of several key factors that affect work and employee culture.

- Hiring For the Future
- Interview Guide
- Assessing Employees and Performance
- Employee Morale
- Assessing Morale
- Downsizing
- Reducing Staff Hours or Pay



Finding the Right Path: A Guide to Leading and Managing a Title Insurance Company

Main sections in each chapter

CHAPTER 8: STARTING TO MANAGE

What to do if you are a first time manager or starting to manage a different or new team or group.

- The First 90 Days
- Understanding Your Management Style
- The New Manager Checklist
- Managing Younger Workers
- Managing Older Workers
- Managing Your Time

CHAPTER 9: INFLUENCING BEHAVIOR

Creating a connection between telling and doing: making sure desired employee behavior is encouraged, supported and rewarded.

- Pinpointing Behavior
- Creating a Connection Between Telling and Doing
- Positive Consequences
- Punishment and Negative Consequences
- Look For Opportunities to Manage the ABC's

CHAPTER 10: SETTING EXPECTATIONS

Clearly communicating expectations: an essential part of effective management.

- Goal and Objective Setting
- Developing Standards
- Making Goals, Objectives and Standards Work Together
- Communicating Individual and Team Expectations

CHAPTER 11: SUPPORTIVE COACHING

Whether feedback is spontaneous or planned: tactics managers can follow to improve their supportive coaching.

- Providing Feedback
- Positive Feedback
- Constructive Feedback
- The 8 B's: a list of coaching behaviors for supportive managers to consider.
- Self-Evaluation: Are You a Good Supportive Coach?

CHAPTER 12: MANAGING PROBLEMS

How managers can proceed in a systematic way when behavior and performance problems persist.

- Analyzing the Situations: Key Questions to Ask
- Meeting with the Employee

CHAPTER 13: WHY MEETINGS ARE IMPORTANT

Conducting effective meetings on a regular basis: making them a part of your skill set.

- Preparation
- Conducting the Meeting
- Ways to Make Your Meetings Interesting and Fun
- Conducting Informal Meetings
- Social Networking

CHAPTER 14: MAKING CHANGE PRACTICAL

Why employees resist change and six steps managers can follow when planning for change in title insurance companies.

- The Reasons Employees Resist Change
- Step One: Know What and Why You are Changing
- Step Two: Know Who is on Your Side
- Step Three: Form a Change Team
- Step Four: Develop a Communication Plan
- Step Five: Consider Starting Small
- Step Six: Monitor and Evaluate Your Progress on an Ongoing Basis
- Why Change Efforts Fail