



JAM Team – left to right
George Amidon, Kaleen Barbera, Jim Morel and
Greg Heffington

Summer 2015 JAM Sessions

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Our featured program:

CLOUT—Creating Greater Influence

Learn how to enhance your:

- Personal Appeal
- Emotional Appeal
- Social Appeal

The Power of Positive Thinking

by George Amidon

At JAM Consulting we have had the opportunity to work with many talented sales people. While these individuals run the gambit of personality types, we have begun to see similar characteristics among the most successful. What I would like to do is share some observations and thoughts around what we see, along with some insight from research done by others in the hope of making you more aware and self-reflective on how this might apply to you. As we have worked with individuals and organizations, one of the common themes we come across is that CHANGE is constant. With CHANGE comes CHAOS and that can lead to inaction. Inaction to an organization or an individual can become toxic. So, what can we do when faced with

change? In working with Dr. David Morrison, his research on The Characteristics of the Highly Successful, what he found was that when change occurred, these individuals viewed the opportunity presented by the change trumped the risk associated with it. These individuals were highly resilient and could bounce back time and again from negative emotional experiences and by flexible adaptation to the changing demands of stressful experiences.

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George Amidon
Managing Partner



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Planning Success by Greg Heffington

Change happens whether we want it to or not.

I have spent a couple of years now researching the need for advisors to have a “succession plan”. It started with an assignment for a client who was looking for something of value they could use as part of their due diligence meetings. As it turned out, there are so many articles around the topic that it became difficult to sort through all of the noise. (continued on page 5)



Greg “Heff” Heffington RCC
Managing Partner



Who Really Pays the Price for Workplace Incivility?

By Kaleen Barbera



Kaleen Barbera CPC
Managing Partner

Do any of these things sound familiar: people arriving late to meetings, receiving an impolite email from a colleague, finding out someone took credit for a project in which you were instrumental? If so, you're not alone. In teaching our JAM program titled "Clout", my favorite part is really the group discussion that comes up during the sessions. Recently many of the experiences that our participants share have had more to do with incivilities that they've experienced IN the workplace rather than with clients. When clients experience incivility, roughly 60% will choose not to work with that company. But what happens when incivility occurs inside the workplace? The stats are staggering. Authors Christine Pearson and Christine Porath spent 10 years studying this topic and their findings show that from a monetary perspective, incivility in the workplace results in loss of productivity, loss of revenue, turnover, human resource costs, and recruiting and training expenses, to the tune of over \$300 billion each year!!! Additionally, over 90% of people who are treated with incivility will look for opportunities to reciprocate, and over 80% will share a bad experience with those outside the organization. All of this creates not only a viscous cycle of bad behavior, but the company suffers from bad press.

Some common themes we hear that we feel are cause for concern:

"Not minding the basics"- a woman I was speaking with recently has been told on several occasions to 'just shut up and listen to me' by a colleague. It can stem all the way from downright rude behavior to things that initially seem superficial, like not greeting or making eye contact when walking past a coworker, not saying 'excuse me' when appropriate, and interrupting and checking cell-phones while in meetings.

"High-schooling"- getting the impression (typically through implied actions, but not always as blatant as the previous example) from one or more co-workers that you are not part of the crowd and better watch your back. This appears in situations such as not being invited to meetings or involved in team initiatives, receiving unflattering emails with key individuals CC'd, and generally being ignored or one-upped every time you have an idea or need cooperation. A gentleman I spoke with the other day was recounting his early career in the packaging industry. Once this person's direct superior realized he had the knowledge to help his department succeed, he was figuratively cut off at the knees. His boss even went so far as to cancel supply orders to make him look like he was failing. The outcome was that the company lost revenue, the employee left to work for a competitor, and the whole division shut down.

"Politicking"-similar to 'high-schooling', this is a clear undermining of everyone else by managing up of one or a few people. It includes a general misrepresentation of the Politicker's self and his or her efforts at the expense of others not getting credit, publicly or privately issuing blame to a coworker when the boss is present or involved, developing initiatives that are clearly self-serving, and putting one's self in the limelight when it's obvious others would be more appropriate. [\(continued on page 4\)](#)



Coach's Corner by Jim Morel



The "Coach"
James A Morel
President

Contenders versus Pretenders

Do you struggle separating clients that are contenders for new business from clients that are pretenders for new business? Would you like to eliminate the " Maybe" response and quickly identify if an opportunity to close on your idea is real?

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The Power of Positive Thinking

by George Amidon
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Issue 4

"BEING POSITIVE IN A NEGATIVE SITUATION ISN'T NAIVE, IT'S LEADERSHIP."

What we've observed along with opportunity trumping risk and resiliency is that the most successful sales people have a very positive outlook. They are, by nature, more optimistic than pessimistic. A study released back in 1985 by Michael F. Scheier and Charles S. Carver shared a term called Dispositional Optimism which, simply put, was expecting good things to happen. Optimists are problem solvers who try to improve the situation and, if they can't alter it, are more likely to accept that reality and move on. Positive thinking isn't about being Pollyannaish, but instead is taking a realistic view with a positive approach. Finally, an exercise used by many top sales people as well as world class athletes is the use positive self-visualization.

Nancy Constant, President of Offenburger-Constant Inc., offers these 5 steps for visualization:

- Set a goal – make sure it's what you want, not what you don't want.
- Relax – your muscles and let go of other thoughts.
- Use as many senses as possible – sights, sounds, smells, tastes, physical feelings to make your image come to life.
- Feel emotion – it helps to recall an experience when you felt the desired feeling – confidence, enthusiasm, energy, etc.
- Focus on your visualization often –repetition will program your mind to respond automatically.

Visualization can create concrete change. Use your imagination to visualize yourself establishing and building good client relationships in the selling process and watch your sales grow for real! While these aren't the only characteristics we've observed, they are ones that show up time and time again. As you self-reflect and look at how you approach both your business as well as your personal life, do you see the opportunity or focus on the "what if"? When things don't go well, which they will, do you dwell on the negative or bounce back and approach it from a different view point? Finally, when you prepare for that appointment, big meeting, presentation, etc. do you focus on what you don't want to do or on how well it is going to go? As always, good luck and good selling!

Coach's Corner

(continued from page 2)



The "Coach"
James A Morel
President

Try this Closing technique: Acknowledge – Ask. Acknowledge - I appreciate you need time to decide if this idea is something you want to move forward with. Ask - Are you open to re-visit this idea once you have had the time to review it? What have you accomplished? The closed question allows a "yes" or "no" response and eliminates "maybe" separating the Pretender from the Contender. There is more, if the response is "no" ask the client to explain. You may (with new information) be able to pivot to an idea that is more appropriate. If the response is "yes" set the time for the next discussion. Congratulations you have a client that is a contender. For more on Closing Techniques visit our website and check out our program, Compass . . . Navigating Better Finishes!

Who Really Pays the Price for Workplace Incivility?

By Kaleen Barbera
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Sadly, people polled who feel they are in an already uncivilized workplace claim that they feel they are treated with incivility almost on a weekly basis. Again, the cost is monumentally high from both a monetary perspective as well as a reputational standpoint. The repercussions of bad behavior in the workplace literally trickle down to every facet within the organization and out to clients, prospects, and the general public.

Our focus with many of the programs in JAM centers on developing a professional brand. Each individual can do his or her part in establishing a brand that encompasses professionalism, courteousness and civility. Because the cost of workplace incivility is so high, those that wish to truly build and grow within their company need to be concerned with the culture and what they are doing to help create and maintain a civilized environment. How do we keep things around us in check? It starts with each individual making an effort at being a better coworker, leader, and all-around employee. We can each be change agents to improve circumstances. The first thing is to take a look at your own behavior. Do you fit any of the above descriptions? If so, how and why? Are you reacting to those around you? Hopefully not, but while it takes a concerted effort and self-awareness to modify behavior, it can be done. I've worked with several large companies that continually support development and publicly reward positive behavior, and it emulates through each department in a culture of positivity.

On the flipside, if you are living in an uncivilized workplace and aren't one of the culprits causing issues and wish to be a part of making a change for the better, you may be able to see some positive effects, either in your own state of mind or in others, by trying the following:

- Commit to having a **POSITIVE ATTITUDE** every day- the key here is being genuine and being consistent. It will reflect in your emails, your voice over the phone, and your demeanor with others.
- Simply take the time to say hello, make eye contact, and smile. Be approachable and make the effort to connect with others.
- Be **ENGAGED** during meetings. Do not bring your phone, check messages, have a casual attitude or body language that says "my time can be spent better elsewhere".
- Separate the issues that you can do something about from the things you simply can't control, and then have a plan. Voicing concerns to a superior or colleague without offering a solution can be detrimental to your brand, your job, and well-being. Identifying a solution and sharing concerns with only those that can affect change allows you to be a positive part of the process for change that directly affects you and your environment.

However, if the issues are just too overwhelming, hurtful, or detrimental to your career and well-being to manage, contact the appropriate individual/department to discuss.

**"Civility costs nothing, and buys everything."
- Mary Wortley Montagu**



Planning Success

by Greg Heffington
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Almost all of them are focused on one of two ideas: maximizing the value of your practice when you sell it or all of the “dooms day” predictions of what will happen to your family if you don’t protect them. I have also talked with hundreds of advisors in an attempt to understand what you might be thinking when it comes to this topic. I would like to start the discussion by re-framing the idea. To do that let’s start by renaming the idea, let’s call it “Planning Success”.

I get it. I am certain that all of you understand the need to have a plan in place if something were to happen to you, you are a big advocate of this idea when talking with your clients. Family, staff and clients are all counting on you. So with all that out there and the potential for something bad happening to anyone of us, why do only a small percentage of advisors have a plan in place? Congratulations if you have a plan in place, not many advisors do.

I believe there are quite a few things that are getting in the way. Time, perhaps, being the biggest factor. There just isn’t enough time in the day to tackle this one. It is difficult enough finding new clients, servicing those you already have, researching new products, balancing portfolios, staying on top of the markets and what it means to your clients, taking care of your staff, and stepping up when your family needs you. We all love the flexibility our profession accords us, yet it is not an easy job. It takes a lot of time. I also believe that procrastination plays a big part in our inaction.

If there is no vision for the outcome and no immediate incentive for the effort, it stays in the background. YOU have to change that if it is important to you. Look for ways to add the motivation to put it higher on the list of things to do.

Finding a successor is also a significant barrier. Let’s face it, when asked, who is the best advisor in the room? all you would likely pick yourself. You all bring special talents to the table, care a great deal about your clients, and believe you are uniquely qualified to take care of clients and staff better than anyone else in the business. (At least, I hope you believe that.) The challenge is to find someone who might care as much as you do, know what you know and is willing to participate with you in the idea of providing at least a “fail safe” position if you were to “get hit by the bus” if you will. I am going to challenge you to look hard at who you are, what you do, how you do it, and truly understand what you bring to the table. Once you understand yourself, you can then start to look for an advisor who thinks like you and cares as much as you do. That will in turn, allow you to strike an agreement with a like minded individual to provide the fail safe protections your clients, staff and family need in case some unforeseen change were to happen to you. If you want some help, your firm is likely the best place to start. You owe it to yourself to place this a little higher on the list.

**PLANNING FOR
SUCCESS WILL MAKE
YOU EVEN MORE
CREATIVE
-DAN WALDSCHMIDT**



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At JAM Consulting we specialize in helping select sales groups become more impactful in a highly competitive marketplace through personalized programs and coaching. We believe that every client is unique in who they are and the challenges they face.

Developing a personalized approach to address those challenges and elevate their performance is our focus. Our clients say what separates us from our competitors is our ability to listen, understand and adjust to their ever-changing business needs.