



JAM Consulting Group, Inc.



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

# Spring 2016 JAM Sessions

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**Introducing the**  
**newest addition to**  
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George Amidon  
Managing Partner

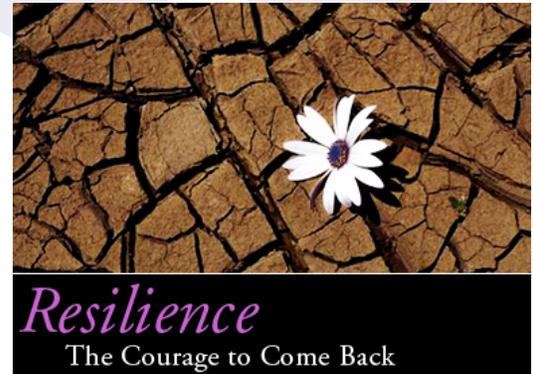
## Resilience

by George Amidon

re-sil-i-ence  
NOUN

Definition:

- The capacity to recover quickly from difficulties; toughness.
- The ability of a substance or object to spring back into shape; elasticity.



I have the opportunity to interact with some of the most successful sales people in our industry through our presentations, workshops, and coaching sessions. What I have taken away from those interactions is that there are similarities that most of these individuals share.

Those similarities or characteristics fall under the following areas:

- **A willingness to sacrifice it all** – realizing there are no guarantees, these individuals are willing to take the risk. “I’ve failed over and over and over again in my life and that is why I succeed.” – **Michael Jordan (#1 NBA Basketball Player Of All Time)**
- **An unmatched work ethic** – they realize that there is always room for improvement and to stay ahead you need to outwork the competition. “Today I will do what others won’t, so tomorrow I can accomplish what others can’t.” – **Jerry Rice (#1 NFL Player Of All Time)**
- **They love what they do** – it’s hard to succeed if your heart isn’t into what you are doing. The love for the work is the driving force and motivation. “Each of us has a fire in our hearts for something. It’s our goal in life to find it and keep it lit.” - **Mary Lou Retton (Olympic Gymnastics Gold Medalist)**
- **They stay hungry** – they don’t become complacent with success. They never lose focus on what is important. “Make each day your masterpiece.” – **John Wooden (UCLA Basketball Coaching Great)**
- **They rebound quickly from failure** – it’s about being resilient. “It’s not whether you get knocked down; it’s whether you get up.” – **Vince Lombardi (NFL Coaching Great)**

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# EXPLORE:

## The Benefits of Coaching

Many of you have worked with us in a training capacity, which is a key area of focus and expertise at JAM. Additionally, each partner at JAM is also a professional coach. Coaching, by definition, is ‘partnering in a thought-provoking and creative process that inspires one to maximize his/her personal and professional potential.’

At JAM, our clients appreciate that we are focused on helping people develop the skills to address and overcome challenges, enhance professional performance, and get the results they are seeking. A longtime coaching client described his experience this way: “My work with Kaleen and JAM Consulting has been instrumental in helping me to not only be much more consistent in getting the results I am looking for, but also help me grow as a professional. I find myself utilizing her approach in all aspects of my life and it has become second nature now, resulting in increased confidence and awareness. What I appreciate most about Kaleen is her ability to ask the right questions at the right time. She has an incredible way of getting to the core of what needs to be addressed and then helping me discover the best way to handle it. Her coaching has been critical to my growth as a manager and professional.”

We provide coaching in the areas of sales performance, etiquette, managerial, general business, client relationship management, and life coaching. If you or someone you know might be interested in learning more about coaching, please contact [Kaleen@jamconsultinggroup.com](mailto:Kaleen@jamconsultinggroup.com)





## The Simple Fixes for Email and Voicemail

By Kaleen Barbera



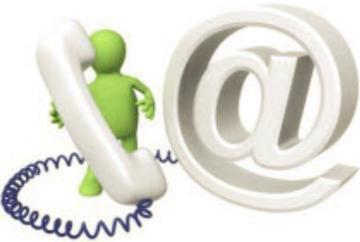
Kaleen Barbera CPC  
Managing Partner

Our last newsletter I wrote about some basic elements of email, phone, and meeting etiquette, but that was just the tip of the iceberg.

At JAM, we spend much of our time coaching professionals on how to differentiate themselves and their brand through refining their communication. In fact, 20 years ago JAM developed one of the top conversation sales models still in use today. However, if you rarely get to have that conversation, then how do you effectively connect, compel, and create opportunity to develop that client relationship? In fact, it is more likely that we will connect with someone first via their voicemail greeting or an email exchange, so how do we make the most of every communication, build our brand by leaving a good impression, and most importantly, get that individual to communicate back?

There are some very common techniques that our clients are finding extremely helpful with emails and voicemails. Here are just a few that you might consider implementing as well:

- The purpose should be to provide a reason to call or take the communication a step further, not to replace a conversation. Very few deals were closed or issues ever got resolved through an email or voicemail.
- Brevity is best. Since you're not trying to have a conversation via voicemail or email, the communication should be short. The possible exception would be an email that includes information you promised to send and/or that the client was looking for. The general rule for email would be short enough for one screen, and voicemail should be less than 22 seconds.
- Have a format for your email and/or voicemails. It should include: the purpose that you're communicating about, the reason it is relevant to the person you're contacting, an acknowledgement that they are busy (respect for time), and a plan for following up with them.



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## Keep the Faith

by Greg Heffington  
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It is a frustrating time for almost all of our clients and coaches engaged in the financial services industry. The level of frustration is palpable. Everyone is becoming weary. No clear market direction, no clear signals as to what is next, world economics don't make sense, oil is still in the tank even after almost 18 months of uncertainty, the possibility of negative interest rates (even in the US), no wait – perhaps another one or two rate hikes, inflationary environment, a recession on its way again, another wonderful election cycle filled with amazing candidates on all sides, terrorist threats, all of this having some effect on markets and attitudes. Everyone looking for answers and guidance and no one has any answers that fit into the “normal” responses we have all come to rely on.

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# The Simple Fixes for Email and Voicemail

by Kaleen Barbera  
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An example email would be:

Dear Dave,

I wanted to connect with you because I've got an idea (purpose) I think you'll find beneficial based on the conversation we had last week (relevance). I know you're busy, (respect for time) so I don't want to tie up your inbox with a long email. Instead, when you have a few minutes to call me back, I would appreciate it. Otherwise, I will reach out again by next Monday (follow up plan).

Best regards,  
John Smith

- Check for errors. Use proper grammar when writing, and articulate clearly when leaving a voicemail. Tip: listen to your own voicemail prior to sending (that handy menu at the end of the greeting will give you the option), and re-read your email 2-3 times before hitting the send button. Errors in writing or inarticulate, garbled messages with filler words (um, yeah, and, like) are deal breakers.
- Subject lines matter. Based on over 3 million emails studied, the subject lines that receive the highest open rates (85% or greater) are: follow up, update, introduction, and checking in. In fact, as soon as the subject line has more than 3 words, the open rate goes down by 60%!

There are a number of additional ways to improve and maximize the effectiveness of emails and voicemails—these are only a few. The most important thing to remember overall is that every time you contact a client or prospect, you are leaving an impression. Make it a good one!

## From the Field

### What's Your Value?

by James Morel

I recently read an article by Ken Sweet, the Associated Press, regarding younger investors (particularly those born in the early 1980's to late 1990's) known as millennials. They increasingly are adapting apps and robo-advisors to make their retirement decisions for them. Betterment, the largest of the robo-advisors companies went from \$1.1 billion in assets under management at the beginning of last year to \$3.5 billion this year. Alois Pirker, research director at the AiteGroup, which studies wealth management trends, says "In terms of the overall wealth management market, robot-advisors are a drop in the bucket. But their disruption potential to traditional wealth advisory is massive". Robo-advisors are brokerages that use computers instead of traditional wealth advisor to allocate client funds across various types of investments. The money goes into low cost exchange-traded funds that own stocks and bonds. The system automatically adjusts the mix as the person ages or if their goals change.

Your challenge...computers are usually cheaper than people, so robo-advisors have been able to attract clients both with their simple interfaces and relatively low fees. Therefore you need to figure out what value you bring to your clients. Consider the following as a basis for communicating your value. What do clients say they like about you? What matters most to you when advising clients? How do you effectively communicate your command of the industry?

Your response to these questions can serve as a basis for articulating your value. Behavioral psychologists tell us that relationships require validation from others, shared values, and confidence in the competencies of one another.

For more information, see Clout and Connect, two separate programs.



The "Coach"  
James A Morel  
President

# Resilience

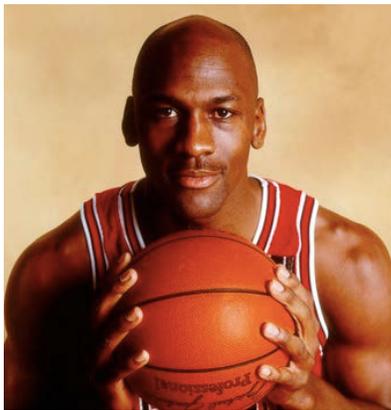
By George Amidon  
(continued from page 1)

What I find most telling is their ability to bounce back from adversity. The idea of resilience and the way they approach those setbacks that occur. As I've looked further into the idea of resiliency I assumed it was a trait that you were born with but in fact it is not. Resiliency involves behaviors, thoughts and actions that can be learned and developed in anyone. In a recent conversation with Dr. David Morrison, who has studied the characteristics of the highly successful over the last 30 plus years, he indicated that when it came to resiliency the following behaviors were evident:

- **The capacity to make realistic plans and take steps to carry them out.**
- **A positive view of themselves and confidence in their strengths and abilities.**
- **The ability to find positive meaning to everyday events.**
- **Skills in communication and problem solving.**
- **The capacity to manage strong feelings and impulses.**



**"I've failed over and over and over again in my life and that is why I succeed."**  
- Michael Jordan



Michael Jordan  
Professional Basketball Player  
Chicago Bulls

In my conversations with the top performers what I hear when sales are down or things aren't going as well as they would like is:

What I can do versus what I can't. What I need to do better versus what someone else should be doing. They are finding ways to solve the problem versus looking for someone else to find the answer.

In our industry our resolve can be tested on a regular basis. Rejection from clients, confusion from the markets, mistakes and mishaps that happen along the way all have a way of making us take stock in why we do this. But developing those thoughts, behaviors and actions that make us more resilient, that allow us to bounce back more quickly will carry us through those challenging times and events.

If you are interested in checking you resiliency level there is a short on-line quiz from the Resiliency Center you can take at: <http://resiliencyquiz.com/index.shtml>

As always, Good Luck and Good Selling!

## Keep the Faith

by Greg Heffington  
(continued from page 3)



**"Always keep the faith and never fear the unknown"**

-Anonymous

The normal human response is to shut down and go hide until this all passes. We know that none of our readers are shutting down nor hiding. We also know that at some point, it is hard to find the energy to just keep moving forward. It is now more important than ever to "keep the faith".

Faith in the importance of what you bring to the table. The ability to ask before tell. Really listen to client concerns and help them process the "noise" being forced into their consciousness every day. You may feel like you have to have all of the answers. It would be great if you did have the answers and if you in fact do, please send them to me so I can feel better about the current situation myself.

The most important thing you can do right now is to stay in touch with your clients. This is not new advice, you have all heard it before and will likely hear it again. Given that, it does deserve to be repeated.

Keep the faith that your opinion counts, that your guidance is valuable, that your resources are helpful, that your information sources are working to assist you, that you are doing important work. Keep an open mind and look for clues and strategies useful at this time (even if they are different from the ones we have used in the past). We would all like to see a clearer picture of the future than the one in front of us right now. I am afraid the picture will remain a little fuzzy of the time being. In this month's newsletter George talks about resilience. Keeping the faith is an important element of that.

# Introducing our Newest Addition:

## Etiquette Advantage

With all the rules around etiquette, do you ever feel like you just aren't sure what protocol a situation calls for? Each newsletter we will dedicate a small section to what we have found to be some of the trickiest situations to deal with based on questions we hear from our coaching and training participants.

**Question: Do I have to hold the door for a female colleague?**

**Answer:** Traditional rules of etiquette would suggest that you should hold the door for a female, but today's rule in the workplace is a bit different. The most polite act is to hold the door for any colleague, male or female. Don't differentiate based on gender, differentiate based on courtesy.

**Question: How do I politely end a conversation at a networking event?**

**Answer:** Most people get stressed about attending networking events and being cornered by a big talker that won't give them the ability to mingle and meet others. To simplify the process, try these steps: first, be completely present and engaged with the person you're speaking to-this will ensure that even if you only spend a couple of minutes with him/her, you've made a polite impression. Second, if you haven't asked for a business card, wait until the time you'd like to move on and ask for it then. Try saying, "It was really nice meeting you but I don't want to monopolize your time. If you don't mind giving me your business card, maybe we can reconnect at some point in the near future?". Another approach would be to simply say, "Thanks for your time, I've enjoyed our conversation, but need to connect with a few others before the end of the event. Maybe we can reconnect in the near future?" When done in a genuine manner, you'll be viewed as tactful and polite.

We'd love to hear your feedback and questions! If you have a question you'd like to have addressed in our next newsletter, please email [Kaleen@jamconsultinggroup.com](mailto:Kaleen@jamconsultinggroup.com)

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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.*

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