

JAM Consulting Group, Inc.



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

Winter 2016 JAM Sessions

Our featured program:

Coaching The Sale

Learn how to:

- Discover
- Discuss
- Decide

We have several informational videos on "Coaching The Sale". Please visit our YouTube Page at https://www.youtube.com/channel/UCxyl0575gdFNGHfC_6vy35w

Awareness

by George Amidon

Within nearly all of our programs we discuss the importance of being aware. The idea that understanding yourself is critical so that you can better understand others and become more connected in the interactions you have. Being self-aware is a significant part of building our emotional intelligence.

So why is being self-aware such a challenge? Dan Solin in an article in Advisor Perspectives, December 2015 discussed the importance of self-awareness and referenced Tomas Chamorro-Premuzic, CEO of Hogan Assessments and a professor of business psychology at University College London and Columbia University, who stated there "is a clear gap between our self-views and other people's views on us, and the bigger this gap, the more dysfunctional our relationships with others will tend to be."

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George Amidon
Managing Partner

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Greg "Heff" Heffington RCC
Managing Partner

Where Are You?

by Greg Heffington

So here we are, a new year, new plans or at least revisions to an old plan, and a fresh outlook on what success may look like for 2016 with only remnants of 2015 in the rear view mirror.

I have very dear friends, Royal and Linda, who spend a lot of time in the summer months hiking/climbing the glorious 14,000+ foot peaks here in Colorado. (For those of you who don't know there are 57 of them and there are a significant number of people who will not rest until they have "bagged" them all.) Royal and Linda are two of those people. We were regaling each other over the holidays about one such "hike". Linda is someone who has some very profound thoughts and actually keeps track of them in a personal log. She shared one of them that I found particularly interesting.

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Setting the Stage

By Kaleen Barbera



Kaleen Barbera CPC
Managing Partner

My daughter just entered her senior year of high school and so, of course, college was the dominant topic of conversation over the last year. Her dad and I had always known our daughter was uniquely capable of accomplishing anything (well, I think most parents think this), and her dream was to attend an Ivy League school. While I was supportive, I was cautioning her that this was not a certainty, as I had been regularly educated by my friends with college-bound kids about the ridiculous competition at schools these days, and if you didn't score above a 33 on the ACT and win the Nobel Peace Prize by your sophomore year, it was probably best to scale back on the expectations.

In my various roles as parent, coach, trainer, and consultant, I've learned and come to understand that whether it's college, the workplace, or life in general, much of what we do is about setting the stage. It's about the things we can control each day. It's the micro and the macro. The things that are the rules by which we conduct ourselves regularly. These things establish our reputation, brand, and identity.

A few guiding principles that I've observed over the years as consistent traits that I see in the most successful professionals I work with are:

- Give it all you got, all the time.
- Don't compromise future greatness for immediate 'okayness'.
- Be genuine.
- Seek help and look for ways to improve. Never stop learning or growing.
- Hope is not a plan. Effort and preparation are required.

And then there is the minutiae that makes us wonder why we aren't seeing the outcomes we'd hoped for. It's the wondering why we aren't hearing from our clients or prospects which causes us to question ourselves. I coach a significant number of professionals, and regardless of the position or job title, being in a sales/service industry that is highly commoditized becomes very challenging and at times can drive us to lose sight of what it all means when we don't get immediate results.

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"Believe you can and you're halfway there."

Theodore Roosevelt



From the Field



The "Coach"
James A Morel
President

A Handshake and A Promise

by Jim Morel

Twenty years ago we on-boarded our first client at Jam Consulting with a handshake and a promise. The promise was to leave that client better off than when we first met. That handshake has become a "ceremonial event" each year at this time. Twenty handshakes, twenty promises delivered.

The goal each year with this client as with all our clients has been the same; foster a strong relationship, deliver value with each engagement, and enhance their business performance.

Each year I ask two questions: how have we done and why us?
I would like to share their response.

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Setting the Stage

by Kaleen Barbera
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" You
BELIEVED
you could,
so you did!"

When in your heart of hearts you feel you've tried your best, it's time to remind yourself of this: no one can control everything around us and most of all, we can't predict or control others, especially clients or prospects. So to keep that optimism that the New Year always offers, here are some things to consider:

- People are busy. They are trying to stay ahead of the curve and can only do so many things on any given day. You are not the most important person in their lives. Be available, responsive, and respectfully persistent.
- We all receive an unmanageable number of emails and other communications. Consider that your client is inundated with them. Differentiate by sending short emails and voicemails that express a clear purpose.
- Be innovative and work to find ideas that might help clients and COIs long-term. Go to them with innovative thoughts, not the flavor of the day. Over 65% of top financial advisors polled say that strategic ideas and a consultative, not product-focused, approach are what they appreciate most about the providers they work with. Whether or not you're in financial services, that result can be applied to almost any sales and service industry.

If you are approaching your clients, colleagues, and prospects with honest intentions, a consistent set of values, and doing your best to be resource and offer ideas that are beneficial, then you are setting the right stage. As a result, you can always look back and know you've handled yourself well, even if you didn't get the call back or the return email. However, just like planning my daughter's college career which started years ago, so do the relationships that you have and want to build with others. These things take time. They don't happen overnight, and you can't control the behavior of others in response to you. But what you do today and the consistent actions you carry out have to be such that they create a brand of confidence, reliability, and will lay the foundation for tomorrow.

Getting back to my daughter, she applied to and got accepted at the Ivy League school of her choice. The hard work and planning paid off, even though we were never absolutely sure which way the pendulum would swing; but we, and most importantly she, knew she had done her best to get where she wanted to go.

Keep up the hard work in 2016. Be proud of your efforts every day--they will be worth it.

From the Field A Handshake and A Promise (continued from page 2)



The "Coach"
James A. Morel
President

On relationship..."we appreciate the fact that you always put us first in our partnership." On value..."Your approach to each assignment begins with an open and honest discussion. We find value in these truth talks, which provide us the insight to make informed decisions." On performance..."Our organization has been re-energized through your knowledgeable and experienced team of coaches. We have enjoyed top national ranking each year among our peers. We credit JAM for that performance."

In conclusion, we are proud of our record these past twenty years with each of our clients. With a friendly handshake and a promise for a productive 2016, thank you from the Jam team on our twentieth anniversary.

Awareness

By George Amidon

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Chamorro-Premuzic lists a number of reasons why self-awareness is so rare. Although we could easily understand what others think of us by simply asking them, it's socially awkward to do so. Even if we mustered up the courage, those we ask might be reluctant to give us negative feedback. This may be changing. Chamorro-Premuzic notes an increased emphasis on the benefits of self-awareness. He observes: "Since the late '90s emotional intelligence, which refers to the ability to understand both ourselves and others, has become one of the most desirable competencies, especially in leaders."

Another challenge to self-awareness is that we become so focused on what we want or want to accomplish that we become blind to things around us. That focus is critical to accomplishing certain tasks but if the task is to build a more meaningful relationship then we need to approach that interaction with "bigger eyes." Daniel Simons, in an article in the Smithsonian Magazine September of 2012, discussed his decade plus study of a form of invisibility call "inattentional blindness". He states this form of invisibility depends not on the limits of the eye, but on the limits of the mind. We consciously see only a small subset of our visual world, and when our attention is focused on one thing, we fail to notice other, unexpected things around us—including those we might want to see. When we are so focused on our task (making a sale) we can miss the little signs or cues coming from the person we are trying to establish or develop a relationship with. We are unaware of how we are being perceived and we miss the opportunities to truly build alignment by better understanding the person we are interacting with.



"Since the late '90s emotional intelligence, which refers to the ability to understand both ourselves and others, has become one of the most desirable competencies, especially in leaders."

-Chamorro-Premuzic



Thomas Chamorro-Premuzic
CEO of Hogan Assessments

What can we do? Many of us find that this time of year gives us an opportunity to reflect back and think about what we've done, what went well both professionally and personally and those things that we would like to change as we move into the New Year. That reflection is a great start in enhancing your self-awareness. Thinking about your actions and how they are perceived by others, those interactions that went well and what made them work as well as those that didn't go well and what might have been the cause. Spending time on self-reflection helps to build that "muscle" of self-awareness and the lack of time on it will allow your self-awareness to atrophy like any other muscle that isn't used regularly.

As you move into 2016, increasing your self-awareness will have a positive impact on both your personal and professional endeavors. I would like to wish all of you a happy, healthy and successful 2016!

As always – Good Luck and Good Selling!



Where Are You?

by Greg Heffington

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At one point in an accent, she had fallen behind in the quest. She was perplexed by a thought racing through her mind. While she could see her partner ahead and the objective (the peak) she could also see where she had been, what bothered her was she didn't know where she was. Therein lays the quote. "I can see where I am going and where I have been, but I have no idea where I am." I love that!

Towards the end of 2015, I spent significant hours coaching clients on the plans they have for 2016. Additionally, I spent significant time building out my plans for 2016 as well. The back drop or foundation for planning 2016 was the successes and failures of 2015. The reference points provided by where they had been was great place to start. Looking forward it was easy to see what changes needed to be made to improve on successes and avoid failures. What I failed to contemplate (and I believe most of my clients failed to think as well) is to really look hard at where we are.

It is sort of like getting a good compass heading before embarking on the next leg of a sailing journey. For most of us, there is fairly good path in front of us. We are on it so why change now. It would seem easy enough to just follow the path that we have found or created. Perhaps it won't make any difference to the outcomes we expect, but just maybe, by taking a little time to look at where we are, the path might bend a little towards more predictable or successful outcome.

Focusing on the results is important. Knowing where you are can help establish a more complete picture of what it will take to get the results you are looking for in 2016. I am now re-looking at the goals and missions I have embarked on for 2016 with this in mind. I would challenge each of you to do the same. Perspectives might change and out comes could be better than you could have imagined. Good luck and best wishes for a prosperous and enjoyable 2016.

Financial Advisor Interview



In our work with Financial Advisors, as well as wholesaling organizations, we have the opportunity to interact with some of the most successful individuals in the industry. In this article I'd like to share with you an interview I recently had with Erin Carter who shared some insight on her practice and the value that wholesalers bring to it.

Kaleen: Erin, tell us a little bit about your practice and your typical client...

Erin: *Our Firm, OnPath Financial, employs a team approach to Wealth Management for our clients. Comprised of seasoned financial professionals, our team has vast experience in many facets of financial services and together, we provide a world class, service focused, client experience. Our typical client values more than just investment management. Our client appreciates our holistic approach in providing guidance and management rooted in personalized financial planning.*

Kaleen: What is the percentage of time you spend with clients just educating them on investment products?

Erin: *Product education and understanding is extremely important to us and to our clients. We find that as long as we are working toward each client's personalized goals and financial plan, the products tend to fall into place. I don't think I have ever felt in even one instance as if I have sold anything to a client.*

Kaleen: How many wholesalers do you speak with over the phone during any given week? How often do you meet in person with wholesalers?

Erin: *Personally, I receive between 3-5 calls a week from wholesalers. I tend to meet with wholesalers on average 2-4 times a month, most often in combination with my colleagues.*

Kaleen: What are 3 things you appreciate about the top 5 wholesalers you work with?

Erin: *We are an independent firm and we rely heavily on multiple sources for our research in order for our investment committee to reach a consolidated stance. Market and economic insights as well as fund flows are so very helpful. We appreciate timely data regarding funds or products we regularly utilize and always appreciate client-focused value-add ideas that are unique and meaningful. Honestly, information and ideas that help elevate us as a firm are always welcome!*

Kaleen: What are 3 things you wish they did differently?

Erin: *We've had new wholesalers come in completely unprepared to meet with our group. We find that to be a waste of time for everyone involved as well as a reputation killer for the wholesaler's firm.*

Call me with a solution, not a product and be diligent – don't give up on me if you have conviction, my days are busy and right day, right time sometimes is all it takes.

Do your homework – reaching out to me or my team with a personal touch would be very smart. Generic and canned sales calls to anyone typically go unnoticed – be creative and stand out, I think a few minutes figuring out who I am and what our firm is about could launch you to the front of the line.

Kaleen: Do you feel that relationships with wholesalers adds value to your practice and to your clients?

Erin: *Absolutely – the wholesalers we agree to meet with on a regular basis provide quite a bit of value to us and in turn to our clients!*

We thank Erin and her firm for their contribution to our newsletter. Stay tuned next quarter for another professional perspective interview.



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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.