



Summer/Fall 2018



Spotlight program:

“Think Straight—Talk Straight” . . . Guiding Principles for Leaders



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“Survey Says” . . . The key to unlocking more prospect meetings.

by Kaleen Barbera



Kaleen Barbera CPC
Managing Partner

Earlier this year JAM enlisted the help of Dr. Suzanne Altobello, behavioral and statistical analytics expert and professor at Notre Dame University, to help us answer 2 very important questions for salespeople: 1) how do you get the first appointment with a prospect? and 2) when you get the first appointment, what needs to happen in order to get a second, third, fourth, etc.? The primary area of focus for JAM happens to be in the financial services industry

(wholesalers/advisors), but we see that there are parallels to many other professions; really, anytime there is a client-vendor relationship. The findings were both enlightening, yet not truly surprising. In fact, they were things we had already suspected from years in business but didn't want to assume without doing current research. The results are available in more detail in a white paper, but here is a bit about the process and outcomes.

Where did we start? How do you even go about con-

ducting something like a survey? I can tell you, it's a lot harder than you would think. In fact, it's a lot like trying to call on a prospect. And what's really interesting is that the way we approached developing and executing this project is coincidentally, based on our findings, very similar to what it takes to land those difficult meetings. There's too much in the survey for **(continued on page 3)**



The “Coach”
James A. Morel
President

JUDGEMENT...the organizing concept.*

by Jim Morel *Morrison Assoc. Research

Leadership Assessment Method

JAM Consulting has focused on leadership and skill development, through our newly developed “THINK STRAIGHT , TALK STRAIGHT.” program. This program is a response to an ever increasing demand from our clients' leadership teams. They are challenged to make judgements closer to correct in an uncertain geopolitical environment.

We have partnered with Morrison Associates, who are psychiatrically trained physicians, advising senior leadership. **(continued on page 4)**



The dilemma of Have-Do-Be versus Be-Do-Have

By Greg “Heff” Heffington



Greg “Heff” Heffington RCC.
Managing Partner

It’s an interesting concept that has been around for years, but one that I am just now becoming introduced to and have begun to understand more completely.

One of our clients is fully engaged in an “Intentional Culture” that supports the entire organization, their employees, and their clients. It is based on a simple purpose and values statement (P&V statement): “We Inspire Growth and Impact Lives!”

The organization is supported by a robust tool box of resources to help facilitate the delivery of their P&V statement. One of the more valuable tools (in my opinion) is the idea of Be-Do-Have versus Have-Do-Be. Most of use believe there are certain things we need to have before we can do those things that will allow us to be the person we want to be.

I work with sales teams where many members live in the Have-Do-Be place. When things are not going well, it is easier to focus on those things we don’t have when trying to figure out why success

seems so difficult. I hear comments like: “If only we had this from our marketing department” or “If the market would just give us this, I could get more meetings which of course would allow me to be the top producer at the firm.”

Excuse my French – That’s bullshit, and you know it!

Until now I have never been able to understand let alone articulate the change in mindset from one of Have-Do-Be to Be-Do-Have. Believe me while I can now define the difference and believe I live Be-Do-Have, I fall victim to the Have-Do-Be more than I would like.

As a coach, consultant, and mentor it’s important to live it as well as be able to discuss it so it can be more widely used and effective for everyone. Again, it seems easy to define it and see its power especially when things “workout”. I know it might seem a little confusing or counter intuitive (or both?), but the concept is really nothing more than a mind shift.

What if every day you focused on the

person you want to “Be” (peaceful, fulfilled, inspired, generous, abundant, successful, in love, etc.) then focused on what you need to “Do” so that you could “Have” the things you’ve always wanted to have.

This mind shift puts you in a much more productive place and frankly is something you can actually control. If you are focused on what you need to “have” before you can “do” which will then allow you to “be”, you are leaving a whole bunch to chance. Is that really where you want to live?

Change your mind and “Be” the person you want to be. Then “Do” what you need to do so you can “Have” the things you want to have.

Here are a few things you can do to remind yourself and practice being who you want and how you want to be in life:

(continued on page 3)

Synthesizing

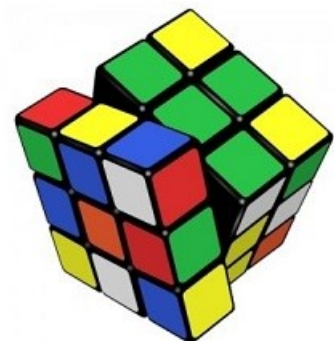
By George Amidon



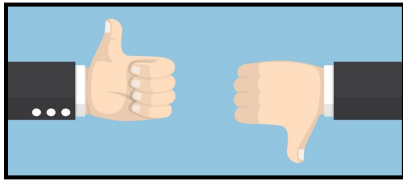
George Amidon CRPC
Managing Partner

In our last newsletter I had written about Leadership and Ambiguity and the factor or attribute within AJIL that looked at an individual’s tolerance for dealing with ambiguity. What I would like to do in this article is to continue looking at the different factors the AJIL assessment measures and how they impact decision making.

The next factor is Scope of Inquiry or



practical problem solving which is defined as interest in investigating diverse knowledge acquired formally or through life experiences to identify how things work. (continued on page 5)



“Survey Says” (continued from page 1)

one article, but here are some key elements we believe to be critical in sharing with you.

First: do some homework. We needed to gather expertise around something we didn’t know, add a bit of our own insights, and understand our audience. Basically, if you don’t know what you don’t know, or who you are reaching out to, you’ll continue to search for who knows what, and how do you add value to that? Garbage in, garbage out. Very much what we found in the survey as well. *Lesson learned: our research proved that FAs are open to meeting with people who take some time to 1) do some homework on THEM, and 2) reflect on what they, as a salesperson/relationship manager, bring to the table.*

Second: determine what’s in it for them (WIIFT). Seriously folks, why would anyone bother sitting down for 30, 15, or even 5, minutes doing something that really was of no value to them? Therefore, we needed to identify why people would take this, not from OUR standpoint, but from the respondents’ perspective. That WHY was defined as ‘the information you share with us will be used to help you, the advisor, receive the most beneficial service from current and future service/product providers by identifying areas of need and opportunities for improvement’. We further sweetened the deal a little with a random raffle giveaway. No it didn’t violate any stringent, rigid regulation. Relax. And yes, you already know people like ‘stuff’. We aren’t saying bring gifts to meetings, NO. What we are saying is that *people need to see a benefit, or that it’s relevant, for them, not just for you. Can you*

make the reward worth taking the risk (in this case, use of time and sharing thoughts/feelings)?

Third: trust and likeability matter. Ok, so you’re saying, ‘duh, yes I know’, but you may be unaware of how much they matter. We sent this survey to close to 1,000 advisors, but we started with people we knew. These people were extremely helpful in giving us critical feedback on the survey itself, as well as passing it along to people they knew. That chain is extremely powerful. (continued on page 4)

people need to see a benefit, or that it’s relevant, for them, not just for you.

Have-Do-Be versus Be-Do-Have (continued from page 2)

Think about one or more of the biggest goals or dreams in your life right now. Think about what it would mean to you to accomplish that goal or dream (i.e. success, fulfillment, freedom, take care of your family, etc.)

Start to embrace and feel that state of being for that person you have envisioned for the accomplishment of this goal. It’s not about “faking it”, it’s about authentically embodying the desired state of “being” you truly want in your life.

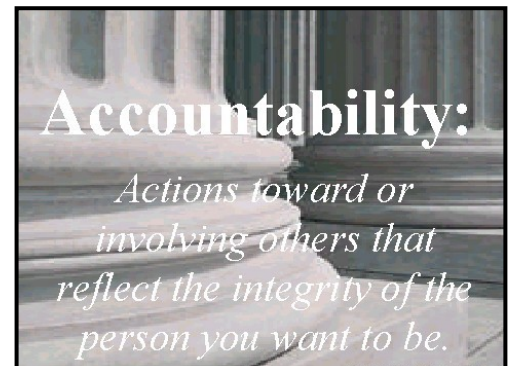
From here, (this state of “being”) think about, talk about, and identify the specific actions you will want to take. Don’t be in a hurry at this point. If you are willing to

actually embrace this empowered state of being, the actions will start to show up and your ability to both take them in and allow them to work will increase exponentially.

Have some fun with this. Seek support from your family, colleagues, and associates. Know just like anytime you are trying something new, you likely trip and fall many times along the way. Get up and keep going.

Remember we are “human beings” not “human doings”. Change your mindset and your life can take off in a profound and fulfilling way.

We are here to help!
Heff



JUDGEMENT...the organizing concept (continued from page 1)

Judgement is an Ongoing challenge to Leaders.

Leaders decisions weigh heavily on outcomes for their organizations. Behind their decisions are known Judgement factors that can influence outcomes.

The Human Impact is Considerable.

To clients to subordinates to subordinates families, many people are counting on leaders' judgements to lead to the best outcomes for all who are dependent on them.

As psychiatrically trained physicians, the mission at Morrison Associates is to help leaders have rewarding careers.

Assessment of Leaders is an Important part of internal succession plans, performance appraisals and of course the effective staffing of projects, programs, and departments. Yet, many of these required factors are hard to define. Organizations refer to aspects of leadership such as creativity, work ethics, street smarts, and intellect as the "intangibles".

What is required is more objectivity around these terms.

Judgement as a Concept

Morrison Associates and Jam Consulting believe the critical element beneath many of these tangibles is judgement. By understanding what comprises solid judgement, leaders can stop using subjective and inaccurate terms and build teams that are more adaptive.

Your Self Assessment has merit and is worth considering. You are in the middle of the most productive years of your life. Now is an excellent time to get feedback and make corrections to get the most out of your leadership.

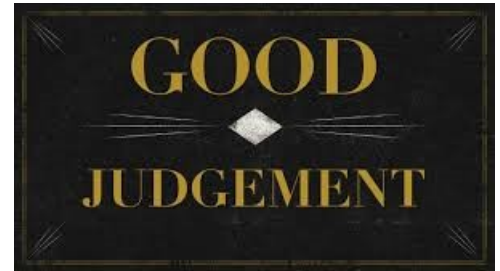
If this peaks your interest and you want to learn more about THINK STRAIGHT, TALK STRAIGHT leadership program, we invite you to visit our website, which includes a video on the program

Jim "Coach" Morel

<http://jamconsultinggroup.com/think-straight-talk-straight/>



The "Coach"
James A. Morel
President



"Survey Says" (continued from page 3)

The WIIFT almost becomes less of a priority because people are willing to help people they know and like. They also trusted us in the fact that we wanted to use the input, THEIR input, to improve their industry. The lesson: referrals and a good reputation matter. How well have you established yourself as someone who is trustworthy and likeable? If you had to ask someone to refer you, are you confident that they would happily do so? If not, then what do you need to do to develop those traits?

In summary, the way we conducted this research project is very similar to how we need to go about approaching new and existing clients. Do your homework, think of how it benefits them, and strengthen your network. There is much, much more that the survey can provide in terms of specific insights and guidance, but we wanted to begin with a few helpful considerations. Let's face it, sales can be challenging, but based on research, it's the things you can do, not your product, that will open doors and keep them that way.

Interested in more of the survey and its results? Follow us on LinkedIn where we will be attaching the white paper, or reach out to us directly.

Kaleen

Synthesizing (continued from page 2)

It's about being able to pull from accumulated knowledge to find practical solutions. Having experiential insight is a powerful resource to draw on. Many individuals have come up through the ranks, so to speak, having experienced successes as well as failures and dealt with many different situations, challenges and crises. This helps form the foundation for practical problem solving. The watch-out is that for individuals that are highly skilled at this that they can gain so much satisfaction or gratification from solving or "fixing" problems that they solve problems others should be solving. Helping others find solutions is key.

Abstractions or Abstract thinking is another factor and it is defined as the capacity to harness abstractions by connecting symbols, ideas or metaphors to construct and communicate for motivation, direction, and strategic clarity. Thinking abstractly helps in making connections of ideas or data and finding common ground. Someone who is high in this attribute can pull the vision and strategic thinking together and identify the interconnections. In organizations this ability

can be helpful in pulling the "message" together and communicating it effectively. The watch-out is that vision and strategy can be too "out there" for some audiences and it is important not to go too far without having them understand what is being recommended.

These two factors help in analyzing information or boiling down the data as we look at making decisions. The AJIL assessment works as a guide point in creating greater awareness as a way to better lead yourself. Utilizing the assessment within our program Think Straight – Talk Straight addresses the common question – Now what? Now what do I do with this information!

For more information on our program Think Straight – Talk Straight utilize the link below:

<http://jamconsultinggroup.com/think-straight-talk-straight/>

AJIL is a trademark of Morrison Associates

As always Good Luck and Good Selling!

George



"I paint objects as I think them, not as I see them."

Picasso



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Why JAM Consulting?

The key differentiator in today's markets comes down to people: their ability to utilize good judgment, communicate effectively, and present themselves in consultative and collaborative ways.

Clients we work with know that it's the capabilities of their people that drive numbers, and say they appreciate that we have positively influenced, educated, and impacted them in ways that continue to tip the scales in their favor.

By developing and delivering research-based training and coaching programs specializing in 4 key areas: leadership, sales, communication, and executive presence, we become a key partner in helping organizations, teams, and individuals become the best version of themselves, ensuring long-term growth, profitability, and sustainability.

www.jamconsultinggroup.com