



Holiday Season 2018



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## Judgment

By Greg Heffington

Judgment is a word that has a significant emotional value in our lives. Depending on the context it can be helpful, harmful, or even feared. Let's face it, we all "judge" others and ourselves and because of that we are very aware that we stand in "judgment" by others and want that judgment to be favorable or measured as "good".

Defining good judgment seems easy or at least in hindsight it is. Here is the definition of judgment from dictionary.com:

### Judgment

noun

1. An act or instance of judging.
2. The ability to judge, make a decision, or form an opinion objectively, authoritatively, and wisely, especially in matters affecting action; good sense; discretion: *a man of sound judgment*
3. The demonstration or exercise of such ability or capacity:  
*The major was decorated for the judgment he showed under fire.*
4. An opinion, estimate, notion, or conclusion, as from circumstances presented to the mind:  
*Our judgment as to the cause of his failure must rest on the evidence.*
5. The opinion formed: *He regretted his hasty judgment.*
6. *Law* .
  - a. A judicial decision given by a [judge](#) or court.
  - b. The obligation, especially a debt, arising from a judicial decision.
  - c. The certificate embodying such a decision and issued against the obligor, especially a debtor .
  - d. A misfortune regarded as inflicted by divine sentence, as for sin. Also called [Last Judgment](#), **Final Judgment**. the final trial of all people, both the living and dead, at the end of the world.

I am going to leave the religious context off to the side and focus on the business application of judgment. (continued on page 3)

## Entrepreneur today, leader tomorrow

By Kaleen Barbera



A few months ago, I was asked to develop and deliver a message to the Roundtable of Young Professionals at the Baker Institute at Rice University. The topic? Entrepreneurship. On the surface, this seemed straightforward, right? NO. If you've ever started your own business, there are literally hundreds of elements to consider. There are not just the tactical elements of execution, but the nuances of people, teams, sales, etc.

Although I had flexibility around exactly WHAT about entrepreneurship I could discuss, my goal was to provide this group of 100+ individuals at least one nugget of useful information around being an effective entrepreneur. Most importantly, I wanted to provide (continued on page 4)



Kaleen Barbera CPC  
Managing Partner

## It's about them not you! By George Amidon

I was recently talking with a friend (Matt) who is an owner of multiple restaurants. In our conversation the discussion came around to the different vendors that call on him and how does he decide on who he will work with and buy from.

I'm fascinated by the similarities that exist across industries, product lines, and distribution models. That similarity is that they are all at their core, about relationships.

As Matt shared with me his experiences it became quite evident that those vendors/sales people that took the time to listen, provided options or ideas that benefited him and cared more about what he wanted than what the vendor was looking to push were the individuals that he not only worked with but looked forward to seeing.

Matt shared with me a few examples of how he is called on. In one situation he shared he had asked his beer distributor to show him some craft beers. He had limited taps within his restaurants and was not interested in the national brands. His sales person came in and immediately began pushing the national brands even though Matt had expressly mentioned he wasn't interested. Did the sales person listen to the client? No, what's more concerning is that the sales person made it about them and not the client. I asked Matt if this was just an isolated incident with just one sales person? He chuckled and said it happens more often than not.

He shared another story about a wine distributor that calls on him and for the convenience of the sales person is always trying to pull a number of the restaurant owners together for one wine tasting. For efficiency sake that makes sense for the sales person but from the clients standpoint is that a personal interaction? Matt knows his competitors and is friends with many but he's trying to deliver a unique experience for his clients and looking for his sales person to understand that and deliver that to him.

There are some vendors that get it! Matt told me about one individual that has taken it upon herself to really get to know him, what experience he wants to deliver to his patrons and what things interest him from a wine standpoint. Looking at his menu, understanding what wines work best with it and being aware of the pricing parameters he wants. She then identifies wines that she thinks meet that criteria and sets up a special tasting for him and his staff. But she always looks for Matt to provide additional thoughts or ideas to the potential list of wines to taste. She gets it! It's not about her, it's about the client and she takes the time to listen and understand what they are looking for. Matt says he always looks forward to the meeting he has with her because she makes him feel that the meeting will be about him and not about her.

In our programs we talk about being consultative and building relationships by following some key behavioral science principles:



George Amidon CRPC  
Managing Partner

- Ask first and tell later.
- Facts are never heard until feelings are addressed.
- Clients need to feel heard and understood to be open to new ideas.
- Structure provides comfort.

These principles are critical to establishing and building long-term relationships. While most of our experience at JAM has been in the financial services industry, it's interesting to see that when it comes to building relationships there is more commonality than difference!

As we start a new year, take a little time to reflect on what your best clients appreciate about what you do for them and how you can deliver that experience to more of your client base.

As always - Good Luck and Good Selling!

George

## Coach's Corner - Observations from the "Coach"

By Jim Morel



The "Coach"  
James A. Morel  
President

The Holiday season signals another year in the books for JAM Consulting. We experienced some disappointments this past year, but mostly hard earned successes. Most importantly, we added to our client family.

We completed a field research project that will benefit our clients in the long term. We coached and mentored hundreds of sales professionals to be effective in the field. We consulted on a merger and rescued a struggling sales organization in the process, to mention just a few of our wins.

Our consulting team made all of this happen in 2018. I appreciate their support, long days, short nights, in answering the bell without fail. Their commitment to our clients remains the foundation to our success. [\(continued on page 4\)](#)

## Judgment (continued from page 1)

The decisions we make in our lives be it personal or business are based on our experiences and influence of others, but primarily on our own judgment, or lack thereof. A higher level of discernment is seeming to be, what is good judgment and how do you measure it? It is easy to see examples of bad judgment, especially in hindsight. I have a personal experience that clearly demonstrates a case of bad judgment on my part that is very fresh in my mind. In fact, it haunts me on some continuous basis and likely will for quite some time to come.

My wife, Barbara, and I were running some errands that we wanted to knock out quickly, so we could fit in a bike ride on our newly acquired e-bikes. I was driving and wanted to turn left into a parking lot across two lanes of traffic. The inside lane was backed up and a nice person had left room for us to turn in front of her. (You have probably already figured out what is coming.) From my vantage point, the curb lane looked free of oncoming traffic and the driver waived me on (I have learned law enforcement calls that “the wave of death”). I assumed that driver was looking out for oncoming traffic that was coming up on their right. I proceeded to turn and bam. Two big fails relating to judgment on my part. The first being I knew better than to trust someone else’s judgment regarding a clear path. The other is not clearly thinking through the ramification of acting impulsively versus thoughtfully.

The bottom line, is my poor judgment ended up injuring Barbara (not seriously, thank goodness), destroying two perfectly good working automobiles and causing great inconvenience to many individuals who were just trying to go about living their lives. I have felt like crap ever since all because of my poor judgment, mostly because I knew better. Perhaps many of you have similar stories or tales to tell.

What is most interesting to me in hind sight is the “I knew better” part. If I had used my experience and knowledge, I would not have proceeded. I had an individual turn left in front of me in the exact situation years ago which resulted in a similar outcome. Only I was the one with the right of way. Again, thankfully no one was injured.

Over many years we have had the opportunity to work with Morrison and Associates. I have been fascinated by their work in the field of leadership and alignment. It has focused on defining and exploring 13 attributes

of success as measured by their Executive Consultation. More recently through the work of Daven Morrison in conjunction with Fred Harburg at Kellogg, I had the opportunity to gain a higher level of understanding around the application of those 13 attributes and their impact on judgment. In fact, I have completed their practicum and certification in administering, interpreting and coaching around the AJIL™ (The Assessment of Judgment and Insight in Leadership) and can now help clients access the report as well as help them improve their judgment and insight.

One would think with that certification in hand, I would have better judgment. But alas, my judgment failed me in the case I described above. Leaving me to wonder why. Checking my own results from the AJIL™ assessment, it is clear to me which of those 13 attributes was likely the cause of failed judgment. The big one in this case is “acting too impulsively when I feel strongly like acting”.

I wanted to get the errands done quickly (continued on page 4) so Barbara and I could enjoy a nice bike ride on a beautiful fall day. The sooner that task was done, the sooner I could have some fun. I failed all around. I didn’t get the errands done and certainly didn’t get the bike ride in. In fact, it would be four weeks before Barbara could even walk, let alone ride a bike.

This might feel like a long journey to get to the point, but here it is:

We all make decisions every day that impact our lives. In business the impact of those decisions weighs heavily on our success both individually and organizationally. Those decisions relay on both judgment and insight. Understanding the factors impacting our judgment and insight can be profoundly valuable both personally and professionally (of course if we use that understanding). So, a fundamental key is not only knowing how you measure up in each of the 13 attributes, but also using that knowledge to improve your judgment and insight. That requires work on our part. Something I am acutely aware of



*“What is most interesting to me, in hind sight, is the “I knew better” part.”*



**Good Judgment?**

right now.

We have incorporated the elements of AJIL™ into our leadership program “Think Straight Talk Straight” and would love to have a conversation around its application to you or your organization, please reach out to us.

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

BE well,  
Heff

## Entrepreneur today... (continued from page 1)

information that didn't just support the entrepreneur through their first 6 months, I wanted to really impart on the attendees a rich, substantive piece of information that they would reflect on years down the road.

My area of expertise isn't in start-up funding, building business models, or recommending a digital platform. My expertise is in the power of people and relationships. As consultants, we get to see the spectrum of what's working in organizations, and what is not. So, I asked myself, based on what I've seen, if any one company that is struggling today could rewind the tape, what could that founder do differently at Day 1 that would increase their success at Day 100, 1,000, and where I am seeing them today?

Despite having LOTS of opinions, I don't have all the answers, so I conducted research as to why companies fail or succeed. And failure rates are obscenely high. Less than 70% of new businesses never make it to their 5<sup>th</sup> birthday. Why do they fail? Study after study said the same thing: leadership. It is the ability or inability of leaders to support their own enterprise that determines success or failure. This makes sense: today's entrepreneur is tomorrow's leader. I personally have seen billion-dollar organizations come undone because of its 'leaders'. Individuals that were the founding fathers of their company couldn't separate their self-interests from the company's best-interests.

But to what abilities of the leader are we referring? What is a leader's number one responsibility?

By studying the role of the leader, we can determine where the source of the problem might be. The leader's 'task', especially in the early stages of development, is to make decisions for the benefit of the company and its mission. It doesn't stop there: decisions require a process known as judgment, and judgment requires three critical elements: 1) accurate perception of reality, 2) ability to properly sort and synthesize data, and most importantly, 3) knowing one's own 'saboteurs' that can get in the way of clear thinking. However, when people don't understand themselves, they don't know how to navigate their own setbacks or learn how to grow from them. Consequently, they misread situations, which can, and often does, lead to poor decision making.

Ask yourself, when was the last time you witnessed someone in a leadership position making an illogical decision despite other's valid input because they were being excessively self-reliant? Have you witnessed a leader misinterpreting a situation and behaving badly because they were acting impulsively? Or that a decision is never reached because the leader is so perfectionistic that things are never 'quite right' for them? These things occur regularly, and undermine the health and strength of people, relationships, and on and on... So, how do you manage this and help people manage themselves?

We have been working with a team of academic professionals and psychiatrists for many years for the specific purpose of helping build, maintain, or restore organizational health by supporting its people. If a task of leaders is to apply good judgment, which relies on clear (continued on page 5)



*"It is the ability or inability of leaders to support their own enterprise that leads to success or failure."*

## Coach's Corner - Observations from the "Coach" (continued from page 2)

Reflection...2019 will be our 23rd anniversary here at JAM. WE looked different day one in 1996. For example, if you don't count my car, I didn't have an office. I financed the company with my credit card and a modest savings account. I didn't have my first client yet, and even scarier, I held multiple titles of Pres., CEO, CFO, COO, Director of Sales and Marketing, Accountant and Secretary. Obviously there have been many changes since that first day in 1996. However, what we did have on day one in 1996 that remains unchanged in 2018 and beyond, is a mission to build client partnerships that last, remain relevant as a consulting partner and leave our clients better off.

I would like to wish everyone happy holidays and a prosperous 2019.

COACH JIM



# Holiday Wishes

*Wishing you and your families a wonderful Holiday Season and much happiness and success in the New Year!*

## Entrepreneur today... (continued from page 4)

thinking, how do we help people achieve that? Our affiliates have created a tool that measures the 3 elements of judgment in order to support an individual in developing new lines of thinking, and we, in turn, have embedded it into our own leadership program titled "Think Straight, Talk Straight". It's only through helping leaders understand themselves better that they can become more accurate in their thinking, making decisions less based on luck and instead, closer to correct.

The most important message, therefore, that I felt I needed to impart was this: start with yourself. Take a self-audit. Identify your strengths and weaknesses; but don't stop there, look for feedback from others. Re-evaluate your approach for making decisions. How well do you know yourself? Do you know and understand how your past experiences affect the way you see the world? What is getting in the way of being able to think clearly and see things as they are? As Harry Kraemer Jr., leadership guru and best-selling author, puts it, "If you don't know yourself, you can't lead yourself. If you can't lead yourself, how can you lead others?"

If you're interested in this topic or have questions on leadership or judgment, we'd love to hear from you.

-Kaleen



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### Why JAM Consulting?

*"Our clients say what they appreciate most is that we help them become the best version of themselves as professionals, creating greater success.*

*We believe in maximizing an individual's potential, which leads to both opportunity and differentiation in a highly competitive landscape.*

*We do that through coaching, developing, and delivering relevant and insightful programs specializing in executive presence, communication, sales, and leadership. Our extensive expertise in those areas and the additional resources we access provide a unique edge to our clients and separates us from the competition."*

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