

# GET JACK'D MAGAZINE

**JACK DALY** |  
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OBSERVATIONS



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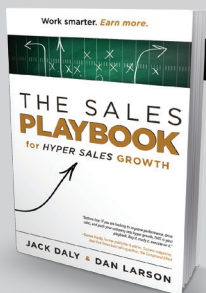
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# GET JACK'D MAGAZINE

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## Welcome!

Most of my readers are well acquainted with my history of goal setting and attendant accomplishments, a process I discovered at the age of 13 after interviewing 200 successful business owners. While I always have goals that provide short-term incentive/rewards to further fuel more accomplishments, the longer-term goals are where the bigger challenges occur. It's all about "stick-to-itiveness." This year was one for the ages!

In April, I finished my 50th state marathon. I chose New Jersey for this accomplishment, the state where I spent my formative years. And speaking of years, this journey took me 14 years. One month later found me on the Great Wall of China, knocking down my seventh continent in my quest to complete a marathon on all seven continents, taking a full 10 years to accomplish this goal (and yes, that included a marathon on Antarctica).

As a lesson in Leadership, this year marked the finish of my visiting all the Presidential libraries in the USA; when you next see me, ask for some of the juicy tidbits on that journey! And, speaking of long-term goals, with the playing of the Pine Valley golf course, I'm now at 95 of the Top 100 golf courses in the USA, 18 years and counting! And, if you are looking for life goal ideas or want to offer help with mine, visit [www.jackdaly.net](http://www.jackdaly.net) and check out my Bucket List.

Keys to success here can be succinctly stated: 1) putting the goals down in writing and going public with them (it's amazing how many people will come out of nowhere to help you with your goals, as long as they know what they are!); 2) having a system of accountability; and 3) tracking and measuring activities, which enables one to break the big goals down into bite-sized pieces, instilling momentum toward your success.

As is normal for this magazine, we have several thought leaders and business professionals sharing their life nuggets toward our success. Additionally, you will find interviews with my Hyper Growth Clients, a Q&A with me, and several articles I've written to up your game, whether you are a sales professional or business leader.

None of this matters without your commitment to "take action." All too often, we see our well-intended readers and participants in our workshops being distracted by the urgencies of the day at the expense of the important. Here's my suggestion: pick three action initiatives from this magazine issue and implement them into your life and business.

BAM!

*Jack*

A portrait of a middle-aged man with short, dark hair, smiling at the camera. He is wearing a white dress shirt and a blue tie with a white and gold geometric pattern. The background is a plain, light color.

# ***Ask Jack***



We all begin each week with 168 hours; however, some are getting much more out of their 168. Identify the High Payoff Activities (HPAs) and book firm appointments for each. Stay focused and watch greater success materialize.

1. **HELP! Looking for anything to assist me with better time management as a salesperson.** Okay, I want you to think of a doctor and how they manage their business, their day. Very often, even with an appointment, we find ourselves in the waiting room. While this is frustrating, for the doctor, it's about maximizing their time and revenue. Imagine having a day calendar packed like that; no, don't imagine it, do it. What I'm getting at is instead of the traditional "to-do" list where we get some of the items done, try planning your day of things "to do" with a daily calendar with set appointments for each item to get done. We all begin each week with 168 hours; however, some are getting much more out of their 168. Identify the High Payoff Activities (HPAs) and book firm appointments for each. Stay focused and watch greater success materialize.
2. **When is the right time for me to invest in an assistant?** Quick story: at 12 years old, I took over a paper route with 32 customers. A year later it was 275, leaving me no room to sell and doing a job of delivery which I didn't enjoy. I hired five assistants (younger kids) to deliver my papers, freeing me up for more selling time. Moral of the story: whenever we can get "non-HPAs" off our plate at a lesser price than what we can earn by added focus on the HPAs, hire that assistant!
3. **I sell a product that's generic and can be termed a commodity. As such, I find myself regularly dealing with price as the hurdle. Thoughts?** You bet! First order of business is read Jaynie Smith's book *Creating Competitive Advantage*, which has real examples of differentiating what appears to be a commodity.

Price objections tend to come from either a lack of trust or a lack of perceived value. Build trust by caring more about the pains and pleasures of your prospect/customer. Tips on perceived value can be gleaned from the book *Steve Jobs* by Walter Isaacson. That should do it.

4. **How much should the CEO be involved in sales?** First off, avoid the first of the three sins of Sales Management and don't be both CEO and Sales Manager because, by definition, you have decided to grow your business part time. Next, I don't encourage my CEOs to sell, but I do encourage them to be out there in the field. Jim Koch (Sam Adams beer) is known for his two-days-a-week out with his sales professionals. The ROI transcends sales and can be beneficial throughout the business.
5. **I know your belief in a compensation model of 100 percent commission for salespeople. Our industry makes that impossible. Have any thoughts?** Sure do. If you believe something can't be done, you will be right. If, on the other hand, you said "We won't do it any other way," then solutions will begin to surface. Watch the movie *127 Hours*, where a hiker gets stuck between two boulders and realizes his only shot at life is to cut his own arm off. At first consideration, it seems impossible. However, if viewed as the only way, the solution is doable. I've worked with many of my CEO Coach clients in overcoming this mind-set and challenge.
6. **You talked about the "Swim Coach" concept in the previous GET JACK'D magazine. I'm still struggling; can you help?** Well, that was broad enough! Assuming you've taken a legitimate

shot at what was suggested in the article from the previous magazine issue, let's try this. Reverse the concept and try to identify where *you* might be a solid "Swim Coach" for other folks. Begin to explore such relationships and, once up and running, go for the law of reciprocity (if the person you "coached" cannot directly help you, perhaps they can refer others to you who can).

7. **We are loving the concept (and now our reality) of a Sales Playbook. Here's the question: How rigid should we be to the scripts?** I'm less about the rigidity and more about the foundational answers. Practicing the scripts with some rigidity, however, will make us more knowledgeable in the area and raise our confidence to such a level of professionalism that the words we string together will come naturally.
8. **How long do you believe it takes to identify if a new sales hire is going to "make it"?** Most people will take issue with my answer, but I believe we can know in most cases within the first week of employment. It's about behaviors and attitudes more than technical skills and knowledge. My experience is that those attributes shine brightly early.
9. **What's a manageable span of control for a Sales Manager?** While there are many variables involved—such as type of business, geographics, and methods of accessing the desired markets—my rule of thumb is 12–15 sales people per Sales Manager. Refer to the book *The Sales Playbook for Hyper Sales Growth* (self-serving plug), where my coauthor Dan Larson and I list the many tasks of a typical, high-performing Sales Manager and the time necessary to accomplish those tasks. ■



# EYE-OPENING OBSERVATIONS AS CEO COACH

By: Jack Daly

**FOR THE** past 18 months, I have been coaching CEOs from around the world in a variety of industries spanning small-, medium- and large-sized businesses. While I'm gratified to see the progress being made by these businesses, I've been taken aback by the vast number of areas I uncovered where there are significant shortcomings. Here's a quick list of 15, after which I will discuss some quick action initiatives aimed at improvement:

1. Vision
2. Business plan
3. Financial plan
4. Cash management
5. Measurement systems/KPIs
6. Organization chart/key positions
7. Sales involvement
8. Key relationships
9. Mentors/Advisory Board
10. Industry networking
11. Culture/communication/recognition

12. Focus
13. Today vs. Tomorrow
14. Continuing education
15. Cheerleader

**Scoring on a scale of one to 10, with 10 being good and 1 being poor, how would you rate your Leadership on each of these 15?**

1. One of the first areas I explore with my potential coach clients is clarity of VISION. I can't help you get there if you



- don't know what "there" is! I'm not talking mission and values here. What I'm looking for is, what does the company look like in the future? Geographical footprint? Size? Locations? Revenues? Margins? Number of people? Channels of business? As my client Brian Scudamore, Founder of 1-800-Got-Junk?, likes to say, the Painted Picture. Can you draw it, and attach appropriate timelines?
2. Once we know the "What/Vision," the BUSINESS PLAN is the "How." Here we are looking for the strategies needed to accomplish the Vision. While the Vision will be further out in the future, the Business Plan focuses on the next one to two years, providing critical specificity as to who, when, where, and how.
  3. The FINANCIAL PLAN comprises our projected Income Statement, Balance Sheet, and Source and Use of Funds (Cash Management). Here's an area that cannot be ignored by the CEO but is too often neglected by the CEO. Delegation is fine; abdication is not. The CEO must have a handle on the numbers of the business and can drive the direction of the firm via-a-vis the BUSINESS PLAN.
  4. Attention to CASH is critical, and daily reporting and monitoring of cash should be a staple of any business. The entrepreneurial graveyard is packed with the bodies of businesses that focused on sales growth, only to find themselves out of cash to "pay the bills."
  5. Key Performance Indicators (KPIs) are essential for the CEO to have a firm grip on. All too often, CEOs ignore the "Leading Indicators," which help us tell the direction the company is heading (as opposed to "Lagging Indicators" which generally report where we have been).
  6. The ORGANIZATION CHART has more to do with ownership of activities and accountability than anything else. The key here is to regularly ask the question as to whether the team in place is the team to take you where the Vision states. Many times, the leadership team a company begins with is not the team that will take the firm where its Vision states.
  7. Paul Orfalea, founder of Kinko's, probably said it best: the job of the CEO is not to run the company; it's to grow the company, and you don't do that sitting behind a desk at corporate. I'm not suggesting that the CEO "sells," but being more active in the field with their sales teams will bring significant growth to the company.
  8. KEY RELATIONSHIPS need to be nurtured on an ongoing basis by the CEO. These can include banking relations, key customers, vendors, investors, and various other relationships that can be relied on in both good and bad times.
  9. Are you tapping into those who have "been there, done that"? MENTORS/ADVISORY BOARDS can be worth their weight in gold in terms of extending the reach of relationships, tapping into growth opportunities, and avoiding losing direction based on their reservoir of experience.
  10. INDUSTRY NETWORKING has presented countless opportunities for growth in my previous businesses. Keeping
  12. FOCUS precedes success. When Steve Jobs was asked what he was most proud of, he surely had plenty to choose from. His answer was quite revealing: all the things he said NO to. Witness Apple as the highest-valued company in the world selling very few products. Yet, we regularly witness entrepreneurs chasing too many shiny objects.
  13. How much of your time is being invested in TODAY vs. TOMORROW? Salim Ismail, in his classic book *Exponential Organizations*, underscores the amount and speed of change in technology and how most business platforms will be rendered obsolete in a relatively short period of time. What are you doing to stay ahead of the change coming to your industry and business?
  14. CONTINUING EDUCATION – How much time are you allocating to staying ahead of your competition and keeping abreast of where your industry is heading? As my friend Verne Harnish says so well, "Leaders are readers."
  15. We use the word *leader* often in business, and I say that we somehow dropped off the beginning letters to what's needed: CHEERLEADER. Building and growing a business is challenging and can often be rewarding. However, I'm hard-pressed to locate the successful business that doesn't encounter potholes along the way. As the CHEERLEADER of the company, it's the CEO's responsibility to secure and grow the enthusiasm of all in pursuit of the Vision. ■
  11. Peter Drucker said it best: CULTURE eats strategy for breakfast. The CEO should ensure the appropriate systems and processes are in place for consistent recognition and communication. All too often we see CULTURE by default, when it should be by design.

Once we know the "What/Vision," the BUSINESS PLAN is the "How." Here we are looking for the strategies needed to accomplish the Vision. While the Vision will be further out in the future, the Business Plan focuses on the next one to two years, providing critical specificity as to who, when, where, and how.

one's ear to the happenings within the industry can often uncover avenues for growth that can often be missed by those whose noses are singularly placed inside the business.

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# IF YOU ARE CONFUSED ABOUT STARTING A VLOG, **READ THIS**



**MY VLOG** DailyVee is the “same” day in and day out because it really is a daily documentation of my life as an entrepreneur and CEO of the advertising agency VaynerMedia (vaynermedia.com). I run an 800 person business, I have client meetings, and employee one on ones. I only moonlight producing content and working on my personal brand as GaryVee. What else do you expect? Of course, it’s all on repeat. The experiences and process of the day in and day out grind has made me better and more comfortable in my craft as a businessman and CEO. I love that my vlog can be repetitive and mundane, because that’s my truth. Despite what you may be seeing on Instagram, the life of a CEO is not filled with champagne and models.

This #Veecap (i.e me recapping episodes of DailyVee through my blog) is all about meetings and the everyday of running my business, but the reason it’s resonates with some of you is because it’s real. I’m showing you all what I do, not what I say, which is the actual blueprint and how I interact with the world, whether it’s my employees, influencers or my amazing community.

The pillar of Episode 371 is my two meetings with NBA hall of famer Dennis Rodman and hip-hop legend Redman.

Both are cultural icons in their own right.

First, Dennis and I chop it up about the power of a personal brand and how impactful his story can be if he decided to document his life. The thing people have to understand is I built my entire business and brand through my cell-phone. On Twitter, Instagram, Snapchat, Facebook, YouTube and everywhere else. People are so taking for granted the fact that it’s 100 percent practical for you to do the same. Start small and build up, build up, build up. And especially if you are someone who has relevance, and nostalgia and culture like these two gentlemen.

I honestly think Redman is one switch away from having a top 10 single or project in culture but he needs to start the process of putting stuff out.

And I selfishly want this vlog to be a landmark for me so that in 15-18-32 months, I can recall it and say that I was part of that process. That’s the power of documentation.

Everyone can pick up their smartphone, open the camera, record and post. Just start talking about the things most important to you. Because in the end, the creative (or how “beautiful” someone thinks your content is) is going to be subjective. What’s not subjective is the fact that you need to start putting yourself out there and keep swinging. 📺

BY: GARY VAYNERCHUK



## ABOUT GARY VAYNERCHUK

**GARY VAYNERCHUK** (*The New York Times* bestselling author)—the inspiring and unconventional entrepreneur who introduced us to the concept of crush it—knows how to get things done, have fun and be massively successful. A marketing and business genius, Gary had the foresight to go beyond traditional methods and use social media tools such as Twitter, Facebook and YouTube to reach an untapped audience that continues to grow.

[garyvaynerchuk.com](http://garyvaynerchuk.com)





Because People Still Hear What You're **NOT** Saying:

# 5 STEPS TO STOP SUGARCOATING AND SPEAK YOUR TRUTH



BY: ASHLEY TURNER

**THE TRUTH** shall set you free! Clean + simple. Nothing else liberates us, frees up stuck energy, lightens our load as much as taking an honest look at what's happening, seeing things clearly and speaking the truth with ease and grace.

Here are 5 simple steps to help

you start living and telling the truth.

**1. NOTICE in what circumstances or around whom you tend to withhold your Truth or sugarcoat.**

Where do you find yourself 'talking in circles' or never getting to the 'heart of the

matter'?

Often this happens with colleagues or other people in our career that we may feel intimidated by or we feel that they have 'power over us'.

Begin to notice who triggers you to keep quiet or hesitate. Do they remind you of a



critical teacher or parent? A dominating sibling? The girl in your grade school who always knew the right answer before you? Or are you trying to protect a lover, co-worker or spouse by not clearly stating your needs, concerns or offering relevant constructive criticism?

Awareness is everything. Just noticing where we shut ourselves down (or up) is the start of changing the pattern.

### **2. Give yourself permission to TAKE YOUR TIME to build up your courage + get clear.**

Speaking truth is a muscle we build. Sometimes, we need a little extra nudge or the “inner cheerleader” to encourage us to fully express ourselves. Instead of beating yourself up for not saying what you really wanted to on that phone call, congratulate yourself for noticing the habit of avoidance or sugarcoating. Then, make a vow to call the person back or set an appropriate time to revisit the conversation.

Sometimes, it takes awhile to develop the clarity of what we really want to say and how. It may be necessary to remove ourselves from the emotion of the moment and pause to drop into your center, or Core Self, and feel what is underneath the surface and needs to be said.

### **3. TRUST that “The Truth Shall Set You Free”.**

Yes, this is a nearly universal tenant in the world’s ancient wisdom traditions (the Bible, the Yoga Sutras).

In yoga, Satya, or Truth, is the second (only after non-violence) of 10 lifestyle foundations (yamas and niyamas) that naturally set us up for freedom and happiness.

Unequivocally, when we live a life based in truth (actions and words), we are happier. It may be the road less traveled, and seem a little more arduous at times, but all those little ways we lie to ourselves and each other clog and sap our energy and unconsciously hold us back from what we really want. We end up wasting a lot of time when we drag our feet and stall instead of facing the music. Often we end up depressed or negative and aren’t sure why – but our energy is actually turning in on itself and on some level we feel this self-abandonment and mistrust.

Truth cuts through illusion. When we speak truth, we are wielding a sword. It slices the fog of illusion and sugarcoating. This will liberate every single relationship you have and not only set you free, but every other person in the circumstance or moment, as well.

### **4. Have NO ATTACHMENT to how or if your Truth is received.**

Your Truth is subjective. It may not be anyone else’s truth or they may very well have their own version of it. However, your Truth is valid! It deserves to be spoken. It deserves to be heard. We can’t control someone else’s perception, but we can give our truth a voice.

Before you begin to speak, take a moment

to drop in + let go:

- Feel into your center.
- Take a couple deep breaths.
- Get grounded and dissolve your attachment to any outcome.
- Release your attachment to it being heard or validated in any way from the outside.
- Know that your speaking truth and standing up for your inner voice is enough.

### **5. PRACTICE this affirmation: “My voice is necessary. What I have to say is valuable.”**

Many of us did not have role models who demonstrated healthy communication. Perhaps, you had a sibling who was always dominating the conversation and you could never get a word in edgewise. Or you were one in a long line of siblings and home was chaotic, loud and overwhelming. Maybe, your mother always deferred to your father and never voiced her true opinions and feelings. Or maybe your family was living a pack of lies to cover up alcoholism, sexual abuse or family secrets. These patterns are deeply ingrained and it’s necessary to lay down new tracks in the unconscious mind.

Practice this mantra every time you feel yourself hesitating to speak your honest opinion and state your needs:

“My voice is necessary. What I have to say is valuable.”

Give yourself permission to be heard. Your truth is just as valuable as everyone else’s!



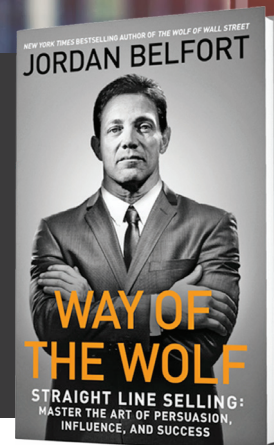
## **ABOUT ASHLEY TURNER**

**ASHLEY TURNER**, M.A., MFTI (#62103) is a yoga/meditation teacher, registered Marriage and Family Therapist Intern, writer, speaker and Initiated Priestess. Deep, witty and laser focused, she draws on the source texts of yoga while incorporating the best of neurobiology, Jungian Psychology, ayurveda, tantra, shamanism and priestess work – vigorously challenging students and clients from the inside out. She is known for her ability to translate complex themes into practical, real-life tools accessible to all. As the Artist-in-Residence at Montage Laguna Beach, Ashley launched Montage’s signature monthly yoga–mind–body workshops. Ashley is a sought after presenter at international events and conferences and contributor to top tier media publications including *Self*, *Shape*, *Mantra*, *Origin*, *Women’s Health*, *Yoga Journal* and *Natural Health*. She focuses on a dynamic vinyasa style of yoga infused with nuggets of wisdom from the roots of yoga psychology and philosophy, deep self-inquiry, devotion and humor. Ashley consults Hollywood creatives, distinguished CEOs, couples, adolescents and individuals. With a diverse palate and ability to speak directly to her audience, Ashley has toured with rock stars, lectured in academic settings and led transformational events worldwide. She lives by the beach in Marina Del Rey, California.

**[ashleyturner.org](http://ashleyturner.org)**

# THE POWER OF GATHERING INTELLIGENCE

BY: JORDAN BELFORT



**THE PROBLEM** with a lot of salespeople is they talk a lot more than they listen. Asking the right questions and then listening to the answers is crucial to understanding your prospects' needs. This asking the right questions is what I call gathering intelligence. You probably call it qualifying. Same thing.

The reason you gather intelligence is, so you can build both an airtight logical and an airtight emotional case for why someone should buy now. Without these two things you have no sale.

The man you're about to meet believed the sole purpose of advertising is to sell stuff. I teach goal-oriented selling. What this means is that from the second you begin a conversation with your prospect you have one goal in mind and that is to close the sale. Every word is deliberate, every tonality is deliberate, every gesture is deliberate so that every step you take brings you a little closer to the close.

## An intelligence gathering story

Okay, so let me tell you a story and this is a classic of Madison Avenue advertising. Anyone in the business worth his salt knows

this one well. There's this ad man working in Racine, Wisconsin, for a company called the J.L. Stack Advertising Agency. His name is Claude Hopkins and he's just picked up a new account in Milwaukee called the Schlitz Brewing Company.

At the time there were some large breweries in the United States and in their advertising they all pretty much made the same claim—that their beer was "pure." Some took their advertising to extremes buying two-page spreads in local newspapers, so they could make their PURE extra-large.

Hopkins began gathering his intelligence by going to brewing school where he could learn the science of brewing, but he says it didn't help at all. So, then he went to the Schlitz brewery. There he saw plateglass rooms where beer was dripping over pipes. So, Hopkins asked, "Why?" He was told the rooms are filled with filtered air, so the beer could be cooled in purity. He also saw beer being filtered through white wood pulp. To avoid contamination every pump and pipe was thoroughly cleaned twice a day. Every bottle was cleaned too—four times before beer was ever put into it. To get the purest water Schlitz had an artesian well that went down 4,000 feet. The water of Lake



Michigan, probably pretty clean at time, wasn't clean enough for Schlitz. The final beer product was aged for six months before being bottled and shipped.

Next, Hopkins went to the Schlitz laboratory where he saw the original mother yeast cell. It took 1,200 separate experiments to get that one cell—all so Schlitz would have the most robust flavor. All the yeast used in making Schlitz beer has come from that one mother cell. Hopkins also learned that a Schlitz family member selects the choicest barley and the brewmeister travels to the old country to gather the best hops.

### Turning intelligence into dollars

With all that gathered intelligence, what does Hopkins do? He sits down and crafts a print ad campaign. He talks about purity, but he doesn't scream it. Instead he weaves it into stories that balance the 50 years of Schlitz brewing experience that have brought about perfection with these new brewing methods that produce the purest beer ever.

Was gathering intelligence in order to sell beer a lot of work? As Hopkins says, "The uninformed would be staggered to know the amount of work involved in a single ad. Weeks of work sometimes. The ad seems so simple, and it must be simple to appeal to simple people. But behind that ad lie reams of data, volumes of information and months of research. This is no lazy man's field."

Did all that work pay off for Schlitz? Within a few months, Schlitz jumped from the No. 5 brewery in the country to No. 1 and held on to that position for many years to come.

Did all that work pay off for Hopkins? We don't know what his salary at the J. L. Stack Advertising Agency was, but he soon moved on to the prestigious Lord & Thomas Agency in Chicago, where its legendary boss, Albert Lasker, paid Claude Hopkins an annual salary of \$185,000 to start. That was in 1907. The equivalent today would be around \$4.6 million. And by the time Hopkins retired in 1923 he had been both the company's president and chairman. Good intelligence gathering and hard work paid off handsomely.

If you'd like to learn how to gather intelligence the right way and you're willing to put in some hard work, I can show you the way to making seven figures too. See my note at the end.

### Some final thoughts

What the Schlitz Brewing Company did was nothing extraordinary. Every brewery produced beer in the exact same way. All Claude Hopkins did was tell people why Schlitz beer was pure. In so doing he gave them the reason why they should choose Schlitz over other beers.

Many believe Claude Hopkins is the father of modern advertising. He introduced us to the free sample, coupons, premiums, split testing and mail order.

I never met Claude Hopkins. Totally different generation. But I've trained thousands of men and women like him. People who weren't satisfied with an average lifestyle and who were willing to roll up their sleeves and learn how to be the best closers in their industry. ■



## ABOUT JORDAN BELFORT

In the 1990s, **JORDAN BELFORT** built one of the most dynamic and successful sales organizations in Wall Street history. During that time, he soared to the highest financial heights, earning over \$50 million a year, a feat that coined him the name "The Wolf of Wall Street."

As the owner of Stratton Oakmont, Belfort employed over 1,000 stockbrokers and raised over \$1.5 billion and started more than 30 million-dollar-companies from scratch.

He's acted as a consultant to more than 50 public companies and has been written about in virtually every major newspaper and magazine in the world, including *The New York Times*, *The Wall Street Journal*, *The Los Angeles Times*, *The London Times*, *The Herald Tribune*, *Le Monde*, *Corriere della Serra*, *Forbes*, *Business Week*, *Paris Match* and *Rolling Stone*.

Today, his proprietary Straight Line System allows him to take virtually any company or individual, regardless of age, race, sex, educational background or social status, and empower them to create massive wealth, abundance, and entrepreneurial success, without sacrificing integrity or ethics.

Jordan's two international bestselling memoirs, *The Wolf of Wall Street* and *Catching the Wolf of Wall Street*, have been published in over 40 countries and translated into 18 languages. His life story has been turned in to a major motion picture starring Leonardo DiCaprio and directed by Martin Scorsese.

**[jordanbelfort.com](http://jordanbelfort.com)**

# The Four Things Successful Marketing Leaders Do Once A Year

BY: ANDREW DAVIS



**EVERY OCTOBER** my inbox swells with emails from marketing leaders asking one question: “What should I have my team focus on for the next year?” Here’s the thing: only you can answer this question. I can’t do it for you. What I can do is help you find the answer.

## The Annual Marketing Get Together

We all do it. We block out our calendar for a couple of days every year to gather our team in one room. The goal: plan for next year. The agenda seems straightforward: let’s get everyone on the same page and marching in the same direction. Let’s plan our year and then let’s work our plan. So why are some marketing teams more successful than others coming out of an annual planning event?

The answer is simple: successful annual planning activities focus on team growth, not team tasks.

## The Difference Between Doing and Growing

I’ve had the honor of being involved in dozens of annual corporate marketing events over the last five years, and in hindsight, I’ve noticed a massive gap between events that result in a successful year and those that don’t.

Too many of us treat our annual planning event as if it’s an extended version of our weekly or monthly marketing meetings. Sure, we extend the time frame to review a year’s worth of activities and plan the next year’s, but aside from the timeframe, the meeting is essentially the same. I’ve watched these kinds of events devolve into a list of to-dos for the following year. What’s more depressing is the fact that the team leaves deflated, exhausted, and even more overwhelmed. These kinds of meetings focus on what we have done, what we currently do, and what we should do next year.

On the other hand, the marketing leaders I’ve watched go on to achieve massive success focus on where the team grew this year and where they have an opportunity to grow next year. That’s it. These marketers treat the annual planning event as an opportunity to help their team focus, learn, and grow. (Now, this isn’t to say that they don’t leave the meeting with a plan on HOW they plan on building the business, they do that too, but the focus is entirely on professional development in the context of the business’s goals and objectives.)

The most successful marketing leaders enhance their annual planning events by doing four simple things anyone of us can emulate.

## Consistently reinforce a clear and straightforward focus

At a recent event for a Fortune 500 consumer packaged goods brand, their CMO opened their annual marketing event by boiling down their entire year’s focus into a clear and straightforward statement. Instead of a powerpoint presentation with 80 slides and hundreds of marketing activity details, this CMO spent 30 minutes setting up a simple statement that captured her vision for the next year. She created a mantra that established the tone for the entire two-day event.

“This is the year of Rigorous ROI [Return on Investment],” she said. In her half-hour setup, she acknowledged that even she has an “ROI blind spot” and she pledged to fill the gap by learning from (and with) her entire team. “This year, we will learn all we can about how to measure the effectiveness of our marketing activities,” she proclaimed.

Over the 16-hours of meetings and side-sessions that followed her opening session the simple, clear, and consistent focus was repeated by everyone from designers to product marketers and became the benchmark for valuable and productive conversations.

Here’s what’s interesting: instead of only



planning activities that the team ALREADY knew how to measure, the team started focusing on activities, tasks, and plans that would close their ROI knowledge-gap. The team focused on professional growth opportunities instead of tactical execution.

The transformation had begun.

Ask yourself, what is the one thing you want your team to focus on for the entire year? Make it big. Make it unattainable. But, make it clear.

### Theme your year

In 2014, I arrived in Iowa to kick-off an annual marketing meeting for a company that sells million-dollar printing presses to printers around the world. As I stepped into the cavernous print shop where the event would take place, I marveled at the machines around us.

I also wondered why a printer manufacturer decided to host his annual marketing meeting at a client's shop 1,000 miles away from their corporate headquarters?

As the Vice President of Marketing stood up to address his team he proclaimed 2015 to be "The Year of the Customer." "First-hand client and customer insight will drive every single one of our marketing and sales activities this year," he stated. "Every single one."

Over the next year, his team would get closer to their clients and customers than ever before. That team planned a "listening tour" where the marketing staff traveled around the world to glean product insight that resulted in their most successful year in the company's 80-year history.

What's your theme for 2019?

### Use some outside inspiration

One often overlooked item that transforms annual meetings from the tactical to the transcendent is the use of outside inspiration. At a little company planning event in Rhode Island, I watched as every single one of the 23 employees arrived at the meeting with a copy of *Content, INC* by Joe Pulizzi.

As the team sat down to hear the CEO kick-off the two-day event, I realized that these books weren't new. Some attendees had plastered sticky notes throughout the book; others had dog-eared page after page. Still, others had highlighted passage after passage. "Is this an annual meeting, or a book

club?" I thought to myself. Even the CEO's copy looked tired and beat-up.

I came to learn that the entire company, every single employee, had read *Content, INC* and they'd been instructed to come to the annual planning event ready to apply what they'd learned in the book to their business selling medical supplies.

Two amazing things happened that day. First, the whole company had a common vernacular and set of examples, stories, and case studies to discuss and apply to their business. And second, an incredible energy and infectious sense of optimism drove the team to consider and present incredibly creative ideas for their next year.

OUTSIDE  
INSPIRATION CAN  
BE PRECIOUS.  
WHETHER  
YOU BRING IN  
AN OUTSIDE  
THOUGHT-LEADER,  
A FACILITATOR,  
WATCH A MOVIE OR  
EVEN READ THE  
SAME BOOK BRING  
SOME INSPIRATION  
TO THE TEAM.

Ask yourself, what can you use to inspire your team to grow in new ways?

### Let your team plot their course

If you've set a clear vision, themed your year, and provided some outside inspiration, you've done your job as a marketing leader. Now, it's time to let your team chart the course. Remember, the most successful marketing leaders use their annual planning event to focus their team's professional development. You've set them up for success; now it's time for you to step back and ask them to plan HOW they're going to improve by learning.

If this is the year you want your team to fill their "ROI blind spot," you want them to put a plan in place to do just that. If you've themed

the year as "The Year of the Customer" how, exactly, are they going to get closer and closer to the center of your client's everyday experience and what impact do you expect that to have? If you've inspired them with some outside thinking to ignite their creativity, how exactly are they going to explore the ideas you've sparked?

Your job isn't to make the plan for them it's to guide and shape the activities, goals, and objectives they plan.

### This Year

So, this year, instead of asking your team to set their goals and objectives in a vacuum, instead of asking them to come prepared to share their key learnings from 2018, instead of creating an extended version of your weekly team marketing meeting, set yourself, your business, and your team up for unparalleled success.

Ask yourself, where do I (and my team) need to grow if we're going to be more successful tomorrow than we are today? ■

## ABOUT ANDREW DAVIS

**ANDREW DAVIS** is a bestselling author and internationally acclaimed keynote speaker. Before building and selling a thriving digital marketing agency, Andrew produced for NBC's *Today Show*, worked for *The Muppets* in New York and wrote for *Charles Kuralt*. He's appeared in *The New York Times*, *Forbes*, *the Wall Street Journal*, and on NBC and the BBC. Davis has crafted documentary films and award-winning content for tiny start-ups and Fortune 500 brands.

Recognized as one of the industry's "Jaw-Dropping Marketing Speakers," Andrew is a mainstay on global marketing influencer lists. Wherever he goes, Andrew Davis puts his infectious enthusiasm and magnetic speaking style to good use teaching business leaders how to grow their businesses, transform their cities, and leave their legacy.

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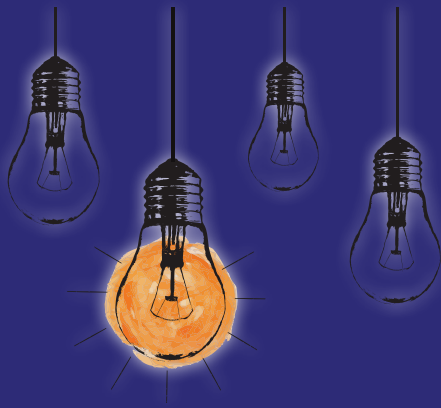


# ***Stop Serving The Feedback Sandwich***

BY: ADAM GRANT



**"When I was preparing for the meeting with the CEO, I learned that all three consultants had tried to compliment him, and he saw right through it. It was time to take the feedback sandwich off the menu and be radically candid."**



**HOW DO** you give feedback to a CEO who's twice your age? I was 25, a new professor called in as a last-ditch, Hail Mary effort to save a dying company. They had already fired three consultants, so why not try me?

The CEO had been leading longer than I'd been alive. After several weeks of watching him in action, interviewing his senior team and gathering data from his employees, it was time for me to bring down the hatchet. His company had merged with another firm and he was still trying to figure out where to go. His team desperately needed him to outline a vision.

When I went to colleagues for advice, they all told me the same thing. Put a slice of praise on the top and the bottom, and stick the meat of your criticism in between. It's the compliment sandwich, as Stewie Griffin called it on *Family Guy*—a technique for giving feedback that's popular among leaders and coaches, parents and teachers.

But when I looked at the data, I learned that the feedback sandwich doesn't taste as good as it looks.

Problem 1: The positives fall on deaf ears. When people hear praise during a feedback conversation, they brace themselves. They're waiting for the other shoe to drop, and it makes the opening compliment seem insincere. You didn't really mean it; you were just trying to soften the blow.

Problem 2: If you avoid that risk and manage to be genuine about the positives, they can drown out the negatives. Research shows that primacy and recency effects are powerful: we often remember what happens first and last in a conversation, glossing over the middle. When you start and end with positive feedback, it's all too easy for the criticism to get buried or discounted.

Giving a compliment sandwich might make the giver feel good, but it doesn't help the receiver.

Instead, try these four steps to make your criticism feel constructive:





### 1. Explain why you're giving the feedback

Recently, a team of psychologists was able to make feedback 40 percent more effective by prefacing it with just 19 words:

"I'M GIVING YOU THESE COMMENTS BECAUSE I HAVE VERY HIGH EXPECTATIONS AND I KNOW THAT YOU CAN REACH THEM."

Rather than feeling attacked, now you feel like the person has your back and believes in your future. People are remarkably open to criticism when they believe it's intended to help them. As Kim Scott observes, people will accept being challenged directly if you show that you care personally.

### 2. Take yourself off a pedestal

NEGATIVE FEEDBACK CAN MAKE PEOPLE FEEL INFERIOR. IF YOU LEVEL THE PLAYING FIELD, IT'S A LOT LESS THREATENING:

"I've benefited a lot from people giving me feedback, and I'm trying to pay that forward."

"I've been studying great managers, and I've noticed that they spend a lot of time giving feedback. I'm working on doing more of that."

"Now that we've been working together for a while, I think it would be great if we gave each other suggestions for how we can be more effective."

All of these messages send a clear signal: I'm not perfect. I'm trying to get better too.

### 3. Ask if the person wants feedback

"I NOTICED A COUPLE THINGS AND WONDERED IF YOU'RE INTERESTED IN SOME FEEDBACK."

I've opened this way many times, and no one has ever declined. Once people take ownership over the decision to receive feedback, they're less defensive about it.

### 4. Have a transparent dialogue, not a manipulative monologue

Organizational psychologist Roger Schwarz suggests a thought experiment. Imagine that you're about to give feedback to two employees, but you have to be transparent about what you're trying to accomplish:

"I have some negative feedback to give you. I'll start with some positive feedback to relax you, and then give you the negative feedback, which is the real purpose of our meeting. I'll end with more positive feedback so you won't be so disappointed or angry at me when you leave my office."

It sounds ridiculous. It's destined to elicit the kind of rage that I haven't seen since Ross Geller bellowed MY SANDWICH?! Here's what Schwarz recommends instead:

"The presentation you gave to the senior leadership team this morning may have created confusion about our strategy. Let me tell you how I'd like to approach this meeting and see if it works for you. I want to start by describing what I saw that raised my concerns and see if you saw the same things. After we agree on what happened, I want to say more about my concerns and see if you share them. Then we can decide what, if anything, we need to do going forward. I'm open to the possibility that I may be





missing things or that I contributed the concerns I'm raising. How does that work for you?"

### Putting it in Action

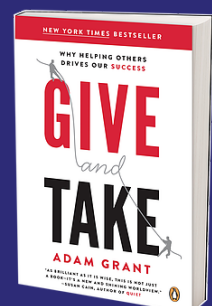
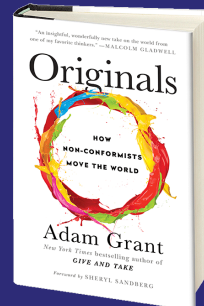
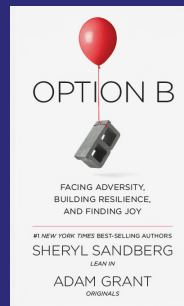
When I was preparing for the meeting with the CEO, I learned that all three consultants had tried to compliment him, and he saw right through it. It was time to take the feedback sandwich off the menu and be radically candid.

I started by explaining why I was giving the feedback. "Your senior team all believes you're the right guy to save this company, and I do too. I hope I've seen something that can help you do that."

Next I took myself off a pedestal. "I see this as a two-way street—there's a lot I can learn from you about leadership. Who are the leaders who have taught you the most in your career?"

He gave me a few examples, and one was a leader with a clear, compelling vision. I took the opening and asked if he wanted feedback: "Your team actually has some pretty consistent views on how you can deliver your vision. Do you want to hear them?"

He nodded and took out a pen. I shared a few of their observations and asked if he agreed. He did—he needed to clarify the vision. A few weeks later, he stood up and rolled out his vision. It was a triumph. ■



## ABOUT ADAM GRANT

**ADAM GRANT** has been Wharton's top-rated professor for six straight years. He is a leading expert on how we can find motivation and meaning and live more generous and creative lives. He has been recognized as one of the world's 10 most influential management thinkers and *Fortune's* 40 under 40.

He is the author of three *New York Times* bestselling books that have sold over a million copies and been translated into 35 languages. *Give and Take* examines why helping others drives our success and was named one of the best books of 2013 by Amazon, Apple, *The Financial Times*, and *The Wall Street Journal*—as well as one of Oprah's riveting reads and *Harvard Business Review's* ideas that shaped management. *Originals* explores how individuals champion new ideas and leaders fight groupthink; it was a No. 1 bestseller praised by J.J. Abrams, Richard Branson, and Malcolm Gladwell. *Option B*, with Sheryl Sandberg, is a No. 1 bestseller on facing adversity and building resilience.

Adam was profiled in *The New York Times Magazine* cover story, *Is giving the secret to getting ahead?* He was tenured at Wharton while still in his twenties and has received the Excellence in Teaching Award for every class that he has taught. He is the founder and host of the [Authors@Wharton](mailto:Authors@Wharton) speaker series, and co-director of Wharton People Analytics. He has designed experiential learning activities in which students have raised over \$325,000 for the Make-A-Wish Foundation while developing leadership, influence, networking and collaboration skills. He is a passionate feminist who serves on the Lean Inboard and the Defense Innovation Board at the Pentagon.

Adam earned his Ph.D. in organizational psychology from the University of Michigan, completing it in less than three years, and his B.A. from Harvard University, magna cum laude with highest honors and Phi Beta Kappa honors. He has earned awards for distinguished scholarly achievement from the Academy of Management, the American Psychological Association, and the National Science Foundation. His pioneering research has increased performance and reduced burnout among engineers, teachers, and salespeople, and motivated safety behaviors among doctors, nurses, and lifeguards. His studies have been highlighted in bestselling books such as *Quiet* by Susan Cain, *Drive* by Daniel Pink, and *David and Goliath* by Malcolm Gladwell. He is a former magician and Junior Olympic springboard diver.

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## ABOUT JOHN RUHLIN

**JOHN RUHLIN** is the founder and CEO of The Ruhlin Group, a firm specializing in high-level gifting plans to build relationships and acquire new clients. John is a sought-after speaker on C-level selling, relationship development and strategic gifting. He's also the co-author of the bestselling book *Cutting Edge Sales*.

**[ruhlingroup.com](http://ruhlingroup.com)**



# Three Tips for Landing Your Next Big Referral

BY: JOHN RUHLIN, FOUNDER AND CEO OF THE RUHLIN GROUP

**ATTRACTING HIGH-NET-WORTH** clients is not a matter of luck or personal style. Line 100 financial advisors against a wall, and even their mothers would have a hard time telling them apart. Those standards make advisors trustworthy, but they do little to distinguish them from one another.

The trick to distinguishing yourself is to build real connections with potential clients. That is something that no brochure has the power to do – no matter how many flashy buzzwords it contains.

For example, I once learned that a new client of mine was getting ready to leave on a fishing trip to Alaska with his brothers, father and grandfather. It was a bucket-list trip they'd always dreamed of taking. The next day, we overnighted beautifully engraved fishing knives to all three generations – father, son and grandson – to create an “artifact” and commemorate the trip in a lasting way. The cost was significant, but as a result of the gesture, we now count them all as clients – among our 40 largest, in fact.

It's not the details of your suit or your car that capture the attention and excitement of potential clients. That is done through interactions that show real interest in them and not their pocketbooks.

How do you make those meaningful connections? From giving the right gifts to crafting pleasant surprises, there are many ways to do it. Here are some of the tricks that I've learned along the way.

## 1. Get them something they can't buy

As I've learned in my corporate gifting business, the importance of unique experiences can never be undersold.

One of my clients was a top financial

advisor with Northwestern Mutual who was trying to break in with some of the business owners in his area. It's difficult to impress company founders; they're a wealthy and catered-to bunch, not easily dazzled by a designer suit. So what did we do?

We hosted an event for founders and their friends and hired America's first master sommelier, Eddie Osterland, to speak on the topic of high-level “power entertaining.” There are approximately 180 master sommeliers in the world, making this a truly one-of-a-kind experience. The impact of the event was huge, elevating my client in business owners' eyes and opening the door to real conversations.

The key ingredient of this event? We didn't talk about business. We just had an entertaining and enlightening evening. Friends don't bring friends to 401(k) seminars, no matter how much wine and cheese will be served. If you want to court your target client and his or her friends, keep it social and create an environment they can't find elsewhere.

## 2. Pay attention to the spouse

A classic mistake too many advisors make is to focus all of their attention on the high earners, ignoring prospects' and clients' spouses and children. Not only is this poor service, but it will also cost you in the long run; it's a major reason upwards of 70 percent of widows switch financial advisors. Don't become a statistic.

Attention to detail with a spouse will distinguish you from the rest and position you for long-term success. If you've convinced just one of the partners in the relationship, you've only done half your job. There will always be tension in the business relationship if both partners aren't on board.

I often look for opportunities when I might normally send gifts to my clients and direct the gift to their spouses instead. The same gesture will mean more to the underappreciated half of the equation and net you more appreciation in the long run.

## 3. Personalize and over-deliver

Your clients are trusting you with a lot as their financial advisor, and this trust doesn't create itself. Take any correspondence or gift that you send as an opportunity to build that trust by letting them know that you care about them personally.

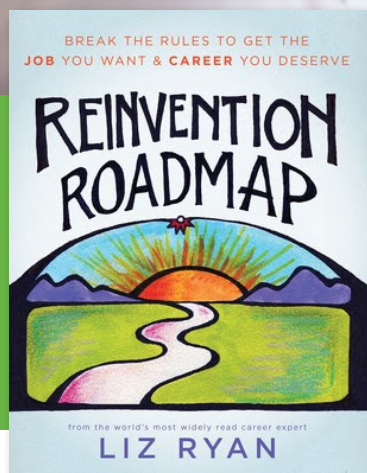
Don't send trite, generic birthday cards. Use your imagination to build a more thoughtful interaction. This can be something small, such as a handwritten note like your grandfather would have sent.

A high-end set of kitchen knives is a gift that's off the beaten path. Your client will think of you every time he or she dices a tomato. My company deals with Cutco knives, which tend to be conversation starters. They help us gain referrals when people explain where they got them.

You'll find that being thoughtful and looking for chances to do something unexpected will open up opportunities you never imagined. I once found out that a client was going on a hunting trip in Montana for his 60th birthday. I tracked down the name of the camp he was going to and mailed ahead a personalized, gift-wrapped hunting knife. Not only did I retain that client, but he was blown away, ordering 10-times as much from us the following year.

Don't confine yourself to the traditional routine of form birthday cards and guy-centric ball-game outings. Be truly thoughtful and consider the whole family. You'll be amazed by the results. ■

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# Is Career Reinvention In Your Future?

**IF YOU** stop and look back over your career so far, you'll see how much you've changed, even if you've stayed in the same career path for years.

Over time, our perspective changes. We learn from positive experiences and negative ones. Sometimes we have to stop and reflect on our path to see how far we've come!

Career reinvention can be something you take on as a project, either because you're bored in your current career or because you want to bring your work and your passions closer together.

Sometimes career reinvention is forced on us by circumstances – like your company closing its doors or maybe the arrival of an evil boss whose nasty attitude makes it clear that it's time for you to move on.

We don't always know when Mother Nature is going to give us a push – a nudge that says "You could be doing more with your career

– why not investigate?"

Career reinvention is a much bigger prospect than just a change of office location or a new job title. It's a physical change in you, no different from a snake shedding its skin or a hermit crab moving out of a cramped shell to venture out and find a new home.

Reinvention is hard work. Reinvention can cause us to feel strong emotions like anxiety, fear, loneliness and confusion. At the same time, reinvention can feel exciting and exhilarating. Your emotions may go up and down like waves.

That's normal! You are in reinvention. Get ready to ride with Mother Nature for a while!

How can you make the most of your reinvention, whether it was your choice to reinvent yourself or someone else's decision?

The first step is to get a journal and write in it every day, or as often as you can.



Write about your career and life so far.

Write about what you loved to do when you were little.

Write about what you're good at – you are good at many different things!

Undoubtedly you've had the chance to use some of your gifts in your work already. Maybe you have other talents that want to come out and show themselves to the world!

Don't rush your reinvention process. If you need to take a survival job to pay the bills while your reinvention plays out, do it. Don't feel that you are diminished just because you have a job that isn't as lofty or impressive as jobs you've held before. So what?

Anyone who would judge you is not someone whose opinion matters anyway.

You are stepping out into new territory. That can feel scary. Keep breathing and remember that every living thing changes. Change is part of life!

Spend time with friends who get your quirks and your sense of humor. Limit the time you spend with people who criticize you or bring you down. You don't need that energy around you when you're shedding an old skin and stepping into your next adventure!

Take time for yourself. If working in your garden gets you out of your busy mind, then work in your garden whenever you can. Dance to songs on the radio or YouTube. Read your favorite books. Organize your spice cabinet. Do what makes you feel good. Reinvention is exhausting.

Don't feel that you have to solve your reinvention in your head. You couldn't do that even if you tried. Reinvention is not a logical problem. It is not a Sudoku puzzle. It's you opening up to your own possibilities – something that many or most of us have never done before.

Apply for jobs if you want to, but don't feel that you have to choose a formal, final and concrete career direction that will carry you through from here to retirement. Your goal in reinvention is to experience new things, not to make arbitrary rules for yourself and then feel bound to follow them!

You may settle on a career direction that you like at first but learn over time that it isn't your cup of tea. You may explore a career path you never thought you'd like and find that it speaks to you like no job you've ever had before. Don't judge anything you feel in reinvention – just be aware of your feelings.

You will have dreams in reinvention, even crazy dreams that seem to make no sense. Pay attention to signals you get during this time of confusion and openness to new ideas. You may hear a song that reminds you of something you cared about when you were a kid. Notice that! Write about it in your journal.

Get some business cards that include your name and the word Consulting on them. You are a consultant now – not a needy job-seeker! You can work here and there on a consulting basis. When you meet with people for networking coffees or lunches, give out your consulting business card. You are stepping into your power. You are running your own career – not letting anyone else run it for you.

Reinvention can feel like a hike through the desert. One day you think, "I know exactly what I'll do next!" and the next day, you think, "No – I have no idea what to do." Don't stress about the fact that you don't have the answers. How boring would our lives be if we always had the answers!

Little by little, streams will appear in the desert of reinvention and the way will become much clearer. Trust yourself and the universe, put one foot in front of the other and remember that you are amazing and always have been and always will be. Your reinvention will take you to the next place you're meant to be! ■



## ABOUT LIZ RYAN

**LIZ RYAN** is the CEO and Founder of Human Workplace, a publishing and consulting firm whose mission is to reinvent work for people. Liz is a former Fortune 500 HR SVP and the world's most widely-read career adviser. Liz is a LinkedIn Influencer with over three million followers and a columnist for Forbes.com. Liz is the author of *Reinvention Roadmap: Break the Rules to Get the Job You Want and Career You Deserve*, published by BenBella Books in December 2016. Liz is an internationally-acclaimed keynote speaker and the illustrator for her books, lessons, and stories. Liz lives in Boulder, Colorado with her husband and their five kids plus two dogs and two cats. When she is not writing, speaking, drawing or consulting Liz sings opera professionally. Follow Liz and Human Workplace on Twitter: @humanworkplace

**[humanworkplace.com](http://humanworkplace.com)**



# 5 Ways To Build Up Your Business

BY: VERNE HARNISH

## Don't Be Myopic About Marketing

**MOST ENTREPRENEURIAL** companies treat marketing as glorified sales support. Even worse, they fail to use it to crank up the flow of qualified job applicants they need to win. Take a cue from one fast-growing company I know that needed to lure workers physically fit enough for trash collecting. It posted ads in local gyms asking, "Would you like to be paid for your workout?" The fliers

cost next to nothing, and the owner found plenty of energetic candidates.

## Fight Process Paralysis

Functions such as recruitment, billing, and customer care are like hallway closets. You have to clean them up once in a while—not just throw more people at them—so they don't get sloppy. Nurse Next Door, a home health care provider in the U.S. and Canada, found that its payroll and billing

accountant was working weekends before it streamlined her workflow. That saved her a good 20 hours a week. Now the firm teaches the same pared-down approach to its franchisees.

## Love Your Accountants

Most entrepreneurs undervalue—and understaff—their finance department, viewing it as a necessary evil to keep the tax collectors at bay, issue and pay invoices, and provide monthly accounting statements. Big mistake. Hire a sophisticated pro who can gather the granular data you need to see where you're making money by product, customer, location, or salesperson. It's the quickest way to double profits and cash flow in a year.

## Teach Your People Well

If you want the company to grow by a factor of 10, you need 10 times the leadership skills among your key people. They'll need to excel at predicting where the market is heading, communicating the company's values, goals, and priorities—and delegating successfully to their teams. Give them time away from the fray to attend the conferences, classes, and seminars they need to make a bigger contribution—so you don't have to pay for their on-the-job mistakes.

## Invest In Systems

Fast-growing firms need to upgrade their infrastructure at three critical points or their teams will get lost in inefficiency: At 10 employees, you need a better phone system; at 50, sophisticated accounting software; and at 350, a single database that links all key information, so a simple change of address by a customer doesn't trigger a cascade of mistakes. Procrastinating on this will kill your growth. Trust me: Your most aggressive rivals made these changes—last year. ■

## ABOUT VERNE HARNISH

**VERNE HARNISH** is founder of the world-renowned Entrepreneurs' Organization (EO), with over 12,000 members worldwide, and chaired for 15 years EO's premiere CEO program, the "Birthing of Giants" held at MIT, a program in which he still teaches today. Verne is also Founder and CEO of Gazelles, a global executive education and coaching company with over 210 partners on six continents. Verne has spent the past three decades helping companies scale-up.

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# 2019 Workshop Schedule

*jack*DALY

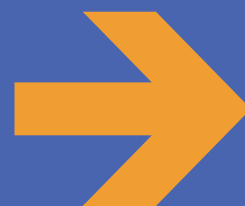
Jan 16	½-day Sales Workshop San Francisco
Jan 17-18	Sales & Management Summit Las Vegas
Jan 22	Full-day Sales Workshop Ft. Lauderdale
Jan 25	Full-day Sales Workshop Philadelphia
Feb 14-15	Sales & Management Summit Vancouver, BC
Feb 19-20	Sales & Management Summit Toronto, ON
April 10	Full-day Sales Workshop Denver
April 11	½-day Sales Workshop San Antonio
May 21-22	Sales & Management Summit Washington, DC
May 23	Full-day Sales Workshop Newark
July 5	Full-day Sales Workshop Calgary, AB
Aug 16	½-day Sales Workshop Los Angeles
Oct 3-4	Sales & Management Summit Chicago
Nov 7-8	Sales & Management Summit Charlotte

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An Interview With Kevin Ginsburg

# Sales Management In Action



By: Jack Daly

**ASSOON** as I met Kevin, I knew I needed to interview him—a supersuccessful sales professional who successfully made the conversion to National Sales Manager. It just doesn't happen very often with success. Starting out as a retail salesperson in his early 20s, he found his start to best be characterized as "struggling." Three years later,

in a company with hundreds of salespeople, Kevin made it to No.8. The key was when he went to the No.1 producer and decided to mirror everything she was doing. Yep, that simple. Often the very best advice to our success is inside our companies yet is too often overlooked. From there, Kevin took a gamble and traveled from Texas to North

Carolina for months to open a new location. Along the way, he discovered his passion, spending over a decade opening new offices around the country. Today he is National Sales Manager at my client Legacy Mutual in San Antonio. Let's learn from Kevin.

1. Straightaway, I asked for his top three actions for sales success. 1) Relentless





focus on high payoff activities and knowing your value; 2) Consultative selling style, being more a resource to your public; and 3) Consistent follow-up. If more salespeople would just practice this, they would find significant payoff and a long career in sales.

2. So, since it's that basic, I wanted to know how a salesperson can stand out from the competition. Kevin reemphasized the concept of relationship driven. Forget "selling" and be more of a "consultant," knowing your value and bringing it every day. My favorite takeaway here was Kevin warning that if you look desperate, you will attract that, so not to compromise (also warning that you will initially make less money, but it sorts itself out to your favor).
3. I wondered about the big challenges of the role of Sales Manager. Kevin focused on just one—Time Management. With \$1.25 billion+ in annual business, covering three states and 40 sales teams, that sure is understandable! Keys for Kevin are the words "Delegate" and "Empower." He stated simply that you can't be everywhere, and that is the key for the organization to move forward without waiting for him. He drives his week by the calendar, with scheduled "touches" throughout, working a week of Monday–Friday from 7:00am–6:30pm. A key takeaway was to handle the newer originators and those growing their production more as a group rather than in one on ones, freeing time to spend with the top performers. That sure resonated with me and my sport coach analogies.
4. With Kevin making the move from sales to management, I was eager for his observations. Kevin was open about it being difficult at first, with things seeming to go slower than he would like. His big advice was that the focus needed to be placed on being "effective" as opposed to being "liked," while also being aware that people respond to different managerial styles, and, as a manager, he needed to respect that.
5. I'm a big proponent of the Sales Manager being in the field. I loved what Kevin is all about here. Eighty percent of his time is spent in the field, and he doesn't even have an office at the company. When at the corporate office, he uses a general use office, and it has nothing in it of a personal nature. Huge takeaway here!
6. Technology was cited as good and bad. The good was all about efficiencies and the leverage for growth that it provides. The downside was the concept of being always connected/available, causing a plethora of distractions. To emphasize the point, Kevin recounted a story of interviewing a sales candidate and during the interview, the candidate kept glancing at his handheld, unaware of all the negative messages being sent.
7. It seems I can't go anywhere without hearing concerns about millennials, so I asked Kevin his take. He indicated he had quite a few on his team and as clients and customers today. Kevin found them as a group to be smart, opinionated/outspoken, and collaborative. Millennials represent a huge demographic shift in both the workforce and as a group in home buying over the next 10 years. We discussed at length the importance of "systems and processes" versus "my own style." Kevin's approach here was to look for the "win." First, show you are genuinely listening. Let folks be heard, then add the "pluses" into the "systems and processes."
8. I'm always curious about what people are reading. While Kevin initially cited *Raving Fans* and *Outliers*, his treasured source is his collection of 20+ books written by his grandfather, who was a businessperson/salesperson/writer and someone Kevin worked with from middle school onward. Kevin credits these works with developing his passion for sales from an early age. I plan to get a personal look into a few of them! ■

**KEVIN GINSBURG** developed his passion for helping clients accomplish their home ownership dreams when he began his mortgage lending career in Austin, Texas. Growing sales through relationships with realtors and builders and working for individual originators, teams, and branches remain Ginsburg's passion and focus. Kevin is a graduate of Texas A&M University and is married with two children. Kevin is currently the National Sales Manager at Austin based Legacy Mutual Mortgage.

# — KEYS TO HYPER — SALES GROWTH

By: Jack Daly

**IN THIS** world of immediate gratification, I'm often asked what are the "quick actions" to growing one's business. In this context, I wrote *HYPER SALES GROWTH*. I'm not sure there are "quick actions," but here is a quick summary of steps.

My overall mantra for business growth is, "If you want to grow your sales, grow your sales force in quantity and quality." Three keys to entrepreneur success:

1. Vision—you can't get there unless you know where "there" is;
2. Key people in key spots—which means someone in charge of growing the sales team; and
3. Culture—creating a business environment where people want to work versus have to work.

I've been selling for over 60 years, having begun selling at seven years old, and I know I'm darn good at it. However, there are only so many hours in a day, which holds me back from more sales. However, if I hire and teach others what I know, that team will eventually outperform me. Therefore, a Sales Manager's job is not to grow sales but rather to grow the sales team. This is key to hyper sales growth. As such, the Sales Manager's job should be focused on holding each salesperson to minimum standards of performance and removing those who don't measure up. Recruiting is a process, not an event, and we should always be looking for additional quality salespeople. There's always room for a top performer! Once on board, it comes down to training, practice, and coaching.

Think sports teams here. In fact, sports teams are run better than most businesses. There isn't a sports coach in any sport at

any level that doesn't have a Playbook. As well, there isn't a coach in any sport that would put the players on the field without proper preparation and practice. Yet, the overwhelming majority of companies do not have a Sales Playbook, which means each salesperson is selling "their way" instead of the best way. On top of that, most salespeople are thrown into the market without training and practice, meaning the salespeople are practicing on real opportunities. Sounds foolish, huh?

The Sales Playbook should, at a minimum, include the following:

- A. Goals for each salesperson. Focus on High Payoff Activities (HPAs), a system of measurement, and a means of accountability. Our estimate is that more than 50 percent of a salesperson's time is spent on non-HPAs.
- B. Proactive Pipeline Management. Identify the prospects, customers, and clients of each salesperson. This pipeline needs to be reviewed at least once a month, and my best clients perform the review weekly. We want to identify how often the salesperson is "touching" each category and what's standing in the way of each prospect progressing into customers and clients.
- C. Employing an effective Touch System. Recent studies have stated it takes an average of nine touches before the prospect knows you exist. Additionally, the touches need to be more about the prospect and less about the company and its products and services. Most sales organizations quit at five or fewer touches, and most of those are all about products and services. People don't

Build your Success Guide. Identify your unique attributes compared to your competition and be prepared with best answers to objections to sales.

want to be sold, and this approach is just that.

- D. Build your Success Guide. Identify your unique attributes compared to your competition and be prepared with best answers to objections to sales. There's hardly anything that goes on in a sales call that you couldn't anticipate before arrival. As such, there is no reason to not be better prepared. The best salespeople are "canned," saying the same thing each time they encounter it. They have figured out what worked and say it as if it's the very first time they've said it.

In closing, with all of the above stated, be alert that 50 percent or more of selling is about ATTITUDE. If you don't believe in your product/services, if you are not passionate about what you do, the prospect/customer will be quick to note that and skip on the opportunity to do business with you. Passion sells! ■







# jackDALY CEO COACHING

**THIS EXCLUSIVE SERVICE IS LIMITED TO A SMALL NUMBER OF EXECUTIVES ANNUALLY WHO ARE LOOKING FOR THE FOLLOWING COMPONENTS:**

**Accountability:** With my experience of building 6 companies into fast growing and profitable national firms, I know how to hold people accountable and how important this is. As well, I've had my own personal accountability team for decades. Simply put, it makes a difference! My standards are high, expect no room to hide.

**Focus:** All too many entrepreneurs chase too many "shiny objects". Yet, when studying people enjoying greater success than most others, it's clear they are focused. As I'm fond of saying "Focus Precedes Success."

**Devil's Advocate:** Possibly the greatest question of all time: "WHY?" As far back as I remember, this is a question that has come natural for me. Be prepared for your Coach to ask it repeatedly.

**Catalyst for Hyper Growth:** So often businesses think in terms of single digits or low double-digit growth. WHY? Your Coach will unleash such roadblocks so we can access Hyper Growth.

**Networker for Resources:** More important than the need to be the "know all" is the ability to source solutions. The Coach is the "go to" resource for matching such needs with worldwide talent.

**Third Party Sounding Board:** Here the Coach brings an outsider's fresh set of eyes with a resource that has a vested interest in the company without a vested interest in "keeping his job." Someone who has "been there, done that."

If this list sums up what you are looking for in a CEO coach please contact  
Jennifer@jackdaly.net or 888-298-6868 to set up an initial call.

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Every business needs a sales playbook. We help you coach, build, and implement Jack Daly's proven systems and processes into your customized playbook. Free coaching session to start. We help you get sales right. The right people, the right systems, and the right leadership help to grow results by Jack Daly design. We deliver a customized coaching plan focused on achieving your sales growth goals: assessment and strategy, skill development, action game plan, and accountability to action.

### Personality Profiling:

This versatile management tool can be used to ensure you hire the right person, get employees off to a fast start, revitalize current employees, improve communication, and build sound employee-manager relationships.

### Recruiting:

We become strategic partners in helping your company discover how the right talent can accelerate the growth of your business. How can you find a seasoned sales manager? Finding top performing sales pros is tough. We can help!

### Hire Top Performers:

Discover the science behind the hire. Take the complexity and guesswork out of the hiring process by putting the right tools in front of your managers. Fully scripted telephone and personal interviews and scorecards with sample responses that allow managers to evaluate candidates with confidence are just a few examples. These tools turn your management team into a superstar talent selection squad!

### Open The Doors:

We can help you generate these appointments so salespeople can focus on closing more sales. At times, companies want to increase sales faster than their salespeople can generate leads. If companies could increase the number of appointments with new prospects, they could close more sales. It's a challenge because sellers are often busy closing sales and have trouble finding the time to get more meetings. We can help you generate these appointments so salespeople can focus on closing more sales.

### Author = Authority:

Grow your sales by becoming a professional published author. Create, publish, and market a book that will grow your business.

### Compensation:

When you correctly align sales-personnel pay with company objectives, you get a win-win outcome for both sellers and the company.

### Jack Daly Sales U:

Curriculum designed to provide Entrepreneurs & CEOs, sales

managers, and sales professionals with the tools, knowledge, and application to successfully sell in today's hyper-competitive business environment. When you complete the curriculum, you will have the tools and knowledge to grow the sales of your business, grow the sales organization of your business in quantity and quality, and effectively build a culture that attracts A-players.

### Send Out Cards:

Your all-in-one resource for sending thank-you notes and all other important milestone correspondence. Our unique online greeting-card-and-gift system invites everyone to act quickly when prompted to reach out to others—there has never been an easier way to send a genuine card or gift.

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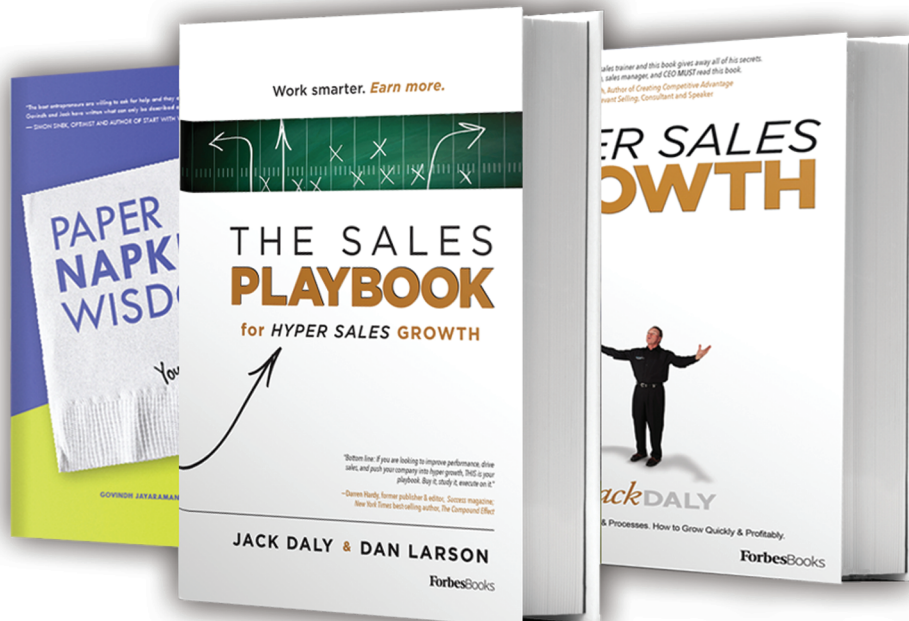
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