

BY AMY BELL

BREAK

*Into the BGA big leagues with
an unbeatable coach*



We all know that behind every Olympic gold medalist, star quarterback and Wimbledon champion, stands a strong, skillful and inspiring coach. But did you know the same goes for many of the most victorious BGA principals, as well?



AS ANY SUCCESSFUL sales coach will tell you, a consultant must go far beyond simply motivating a sales team to win—he has to teach them how to play the game.

their interactions. For instance, the owner of the firm always has the best ideas. No matter how flawed their thinking, their staff are rarely going to have the courage to debate the principal's position. Carriers surrounding the principal are typically working the best interest of their company, not necessarily thinking about what is best for the principal."

That's exactly where a professional sales coach can help. "An objective consultant or coach can be an extremely powerful partner," explains Allison. "A good consultant sometimes acts as the voice of opposition to the principal's ideas. This can be very healthy in that principals rarely have their ideas challenged."

Additionally, he points out that a BGA principal may feel more comfortable discussing her hopes, dreams, concerns and fears with an objective consultant instead of revealing these deep, dark secrets to a colleague or business associate. "A good consultant can develop a relationship with the principal that will allow them to disclose personal and professional insight," he says. "This can be very therapeutic for the principal."

Last but not least, a successful sales coach will hold the principal accountable for his actions and help him come up with a game plan to accomplish his long-term goals. "Most successful principals know what needs to be done to have a better life balance and a more successful company," Allison explains. "With all of the hats that they have to wear, they typically don't have the time or the focus to ensure that those things get done. A good consultant will help them implement these things and drive results."

Pinney, whose brokerage agency has worked with three different sales coaches over the years, says his team has reaped the rewards for hiring these compelling consultants. Of

"Think of how world class athletes use coaches to improve their performance," points out R. Jan Pinney, CEO, President and Registered Principal of Pinney Insurance Center, Inc. "If they see value in coaching, shouldn't we?" Pinney says the benefits these professional coaches can offer a brokerage agency are virtually endless. "No matter how good we might think we are, another set of eyes can be helpful to get even better," he explains.

Read on to discover the immeasurable value an effective sales coach can provide and learn how to score the best coaching pro for your agency's unique needs.

Winning, Duh!

In today's tumultuous and often uncertain insurance world, BGA executives need all the help they can get to gain an edge. In other words, if you want to win in this highly competitive industry, you're going to have to step up your game—and you may need to turn to the pros.

"As an entrepreneur, business can be lonely," says Dan Allison, sales consultant and owner of Feedback Marketing Group. "While the owners of the Brokerage Agencies are surrounded by people, it can often feel like they are alone or on an island... and often the personal interests of those surrounding them can cloud





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EVEN THE MOST BUSINESS SAVVY BGA principals stand to learn a few things from the right sales consultant.

course, each individual coach comes armed with his or her own distinctive brand of insight and expertise.

“Dan Sullivan was my first great coach, and I attended his coaching sessions in Chicago for three years,” Pinney says. “These were really group sessions that he held with a number of like-minded entrepreneurs. He taught concepts like the Top 20, Strategy Circle and the 80% Solution, as well as several others that we use every day in our business. He also explained the power of taking some time off by dividing our life into Focus Days, Preparation Days and Free Days.” Pinney reveals that there was an added bonus with these group sessions. “I actually learned almost as much from the other participants in the coaching sessions as I learned from Dan.”

Pinney has also worked with Becky Castro from the Chet Holmes International Coaching Organization. For the past year, Castro coached Pinney in one-hour weekly or twice monthly phone sessions. “She mostly listened to my goals and aspirations and then helped me formulate strategies to achieve them,” Pinney explains. He says that before he hired Castro, his agency struggled when it came to holding effective meetings. “Becky taught me and my team how to turn meet-

ings into workshops,” he says. “They were much more productive, interactive and allowed us to reach consensus and formulate plans much easier. Almost all of our meetings today are actually workshops.”

Today, Pinney’s agency is working with Dan Allison, whom they hired to coach their brokers. “We decided if being coached was so effective for us, we owed it to our brokers to provide them the opportunity to get better too,” Pinney explains. And it sounds like Dan is already making his mark on Pinney Insurance. “Dan does an excellent job teaching brokers how to generate more referrals than they can handle,” Pinney says. “He uses a workshop format to share his methods and ideas. We’ve used the concepts he teaches our brokers to obtain referrals from our top brokers.”

Triumphant Techniques

Of course, a sales coach is only as effective as the practices she preaches, and it all comes down to her technique. As any successful sales coach will tell you, a consultant must go far beyond simply motivating a sales team to win—he has to teach them how to play the game. That process usually begins with a strong strategy and plenty of problem-solving.

“The number one element that is typically lacking in even the most suc-

cessful firms is a routine, structured process for implementing and measuring simple business development strategies,” Allison explains. “As I’ve mentioned, the principals often know what needs to be done but are simply paralyzed by the magnitude of all of their responsibilities to really think through how to effectively implement and monetize their ideas.”

Allison says the most effective way to help principals achieve greater success is to walk them through the basic model for problem solving, which includes the following steps:

- Step 1: Identify what their objective is for achieving their goals.
- Step 2: Clearly define the problems or challenges that stand in the way of accomplishing those goals.
- Step 3: Brainstorm and consider several potential solutions to the challenge.
- Step 4: Select the best potential solution for the challenge and the positive impact that addressing the challenge will have on the principal’s goals.
- Step 5: Implement and measure the potential solution to accomplish the goals.

Tedious? Maybe. Effective? *Definitely*. As Allison points out, “Building a successful business is not sexy; it is repetition of the basics.”

Score the Perfect Coach

If you Google the phrase “sales coach,” you will almost certainly be overwhelmed by the thousands upon thousands of search results. (About 11,900,000) With oodles of options out there, how can you possibly pinpoint the perfect coach for your specific needs? Before you start searching for the needle in the sales coach haystack, ask all of your trustworthy colleagues, family members and friends if they can recommend a consultant. After all, if a sales coach

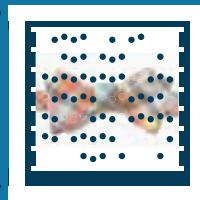
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helped your former co-worker take his business to the next level, she could probably do the same for you.

Once you gather a few recommendations, it's time to narrow down your list. First and foremost, it's crucial to make sure the consultant's values align with your own. "Ensure that the consultant shares your core business values and work ethic," says Allison. Of course, this is easier said than done—and it will certainly take some time. "These engagements can be lengthy and may involve significant time together," Allison adds.

You should also take a look at the coach's past performance, and don't be afraid to ask for references.

"A good consultant should not only have a good track record in working with other principals, but should have built their own successful companies," Allison points out. "It is surprising how many people 'coach' business owners but haven't built their own successful firm. Why take advice from someone who hasn't built the kind of business that you want to build?"

However, Allison points out that the consultant doesn't necessarily need to have experience in life insurance brokerage or even a similar field. "Ninety percent of what it takes to build a successful company is the same from industry to industry. The other ten percent is product knowledge."

Finally, make sure your primary staff members have a chance to put in their two cents. "It is always important to solicit the feedback and opinions of key staff," Allison says. "These key employees often engage with the consultant as well and can often bring unique perspective to the principal's hiring decision."

Don't Fly Solo

Although many BGA owners attempt to tackle this industry on

their own, the most successful principals aren't afraid to ask for a little help from the pros. As it turns out, even the most business savvy BGA principals stand to learn a few things from the right sales consultant.

Pinney says he'll be the first to admit that hiring a coach requires a substantial time and financial commitment. However, he goes on to say the three coaches he's worked with over the years have taught him and his team absolutely invaluable lessons—and he has no doubt that these specialists could help other BGAs work more effectively, as well.

"Some coaches, like Dan Sullivan, have developed concepts that he has turned into a repeatable process that can help BGA principals tackle the challenges of their jobs," he says. "Others, like Becky Castro, help BGA principals articulate what it is that they really want personally and for their businesses and then help them strategize how to achieve what they want. Some are great platform speakers, like Dan Allison and Dan Sullivan, who have spoken numerous times at industry events while others focus one-on-one like Becky Castro. All have helped me immeasurably in my business and personal life."

Amy Bell is a professional freelance writer and owner of WritePunch Inc. With more than 10 years of writing, editing, and marketing experience, she writes for a variety of companies and publications throughout the nation, including Agent's Sales Journal, Blueprints, Real Estate & Construction Review, The Weather Channel, and Turner Broadcasting. She is a University of Georgia Graduate with a BA in Journalism. Visit her Web site at www.writepunch.com for more information.