



# Fair, Firm, and Friendly

Great leaders bring out everyone's best qualities

**M**anaging a team of advisors or agents is a delicate task. Team members vary in personality and accomplishments. Great leaders are able to bring out the best in everyone. I'm often captivated when I reflect on the strengths of today's pronounced leaders. Where do they get their unwavering energy? Why do they succeed year in and year out?

For starters, they have an X factor that average leaders don't: They are committed to their craft, unwavering in their empathy for others, and constantly pushing the limits to get each advisor's maximum potential contribution.

The X factor is described as a noteworthy special talent or quality that makes someone stand out. Those with the X factor are unfailingly genuine in helping people succeed in the financial services business. Their motivation isn't for personal gain, but rather, to see new advisors buy their first homes, or start their own storefront operations, for instance. These advisor wins give them personal satisfaction and a feeling of self-worth.

I once observed my mentor help a fledgling advisor in his early days as he struggled through making cold calls. I would then see this advisor grow into a top producer who was able to put his own children through school by simply writing a cheque. This great mentor received no recognition or accolades, just the personal satisfaction of seeing this rags-to-riches advisor succeed.

Last year, I was fortunate enough to speak at GAMA's Leadership and Management Program as a leading practices speaker. I presented about keeping advisors accountable through the use of reports and data.

A great leader will interpret reports to really learn about their advisors' progress. It is one thing to see a low producer on every report, but quite another to engage with them and their business. The best leaders show a great deal of empathy to their sales advisors.

Chances are the low-producing advisors already know they are at the bottom of the list, and don't need to be constantly

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asked for sales updates, or where their next piece of business is coming from. An empathetic leader will take an opportunity to buy her employee coffee or lunch, get to the root of potential production issues, and try to motivate and improve this producer's results. The successful leader starts by helping with the small steps, then pushes her advisor to reach his full potential. The best leaders have a genuine attitude and desire to see the best in each of their people.

The *Fair, Firm, and Friendly* motto is definitely a trait of the best leaders. My first mentor in the business lived by this adage. While he was always kind to me, he also kept a professional distance. We didn't grab

after-work cocktails and he wasn't my golfing buddy, but he treated me fairly. I never faulted the man for giving inventory clients to my colleague; he was merely being fair based on the volume of business my teammate was capable of bringing in. I also never questioned him if the answer was a simple "no" on any number of matters. He was firm in his stance, and it helped him exude respect.

I used to think he was friendly to a fault, and that advisors took advantage of his kindness. I now get to witness, first-hand that his blind kindness was no mistake, as I attempt to emulate my mentor. He was never taken advantage of despite my thinking. His friendliness was something he used, knowing full well that he was getting the absolute best out of people, and letting many think they "had won" while he presented this seemingly gullible demeanor.

Great leaders are always working *on* the business, and occasionally take time away from always working *in* the business. They tweak a report to gain better insight, revamp a process to drive sales success, use different recognition levers, and make the necessary changes to the team. They are relentless in making themselves and their teams better.

If they had a great campaign or a great year, they are committed to doing even better next time. They strive for the elusive perfection. While that might seem exhausting to some, the best leaders are unwavering in their commitment to their people, operations, and their goals. **■**

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