



# Belief and Execution

## The true impact of field leaders

**F**irms can control many aspects of an advisor's offering, such as marketing and the availability of products. But much of it comes down to whether or not execution is happening at the ground level. Frontline advisors are, in many ways, the face of the organization. They represent the brand and, in fact, in the eyes of their clients, define it. The question then is simple. How do you ensure that the brand delivered is the one that you want?

In reality, the true leverage point is the support, reinforcement, and day-to-day engagement of the field leaders. Sustainable change is driven through the alignment of leadership. This is where the difference can be made. Those who will succeed will be the ones that can execute. And field leadership can influence behaviour on a larger level.

The role of field leadership is paramount in driving the culture, in defining the brand, and in making change. And the impact of COVID, market disrupters, and demographic shifts have created an environment where culture, brand, and the ability to execute have never been more important.

An ability to pivot in this "new normal" is key. COVID shifted what we believed to be true. At one time, many felt strongly that clients would not want to engage virtually, but that has changed. Clients embraced it, as did advisors. Everyone realized that it was more efficient and that the conveniences created often outweighed the perceived value of sitting across the table. Firms needed to step up by furthering virtual capabilities like e-signatures, but an advisor's willingness to engage was key.

Beliefs needed to be changed, and this is where field leaders had the true opportunity to shine. You see, belief drives attitude, attitude drives behaviour, and behaviour drives activity. Belief drives the ability to respond with passion. Without it, you are simply delivering a message, nothing



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more, nothing less. But the power of the message is muted.

### **BELIEF > ATTITUDE > BEHAVIOUR > ACTIVITY**

If you believed that your clients only wanted the kitchen table relationship, then your attitude could have been "my clients won't want to meet virtually." Your behaviour might have been to ignore or downplay any capabilities that were available. The activity that you demonstrated, perhaps, was to rely on old methods of engagement or to not engage at all. Many were pulled into it

when in fact this was a prime example of where leaders had the opportunity to make a difference.

Field leaders had three roles. They needed to believe. They needed to advocate for advisors. And then, they needed to help advisors believe and execute by:

- Highlighting those advisors who had already embraced the technology;
- Promoting the enhancements made by firms; and
- Working with those who needed help.

But they needed to believe first.

As programs are developed, as training is created, as changes are anticipated, field leaders hold the key. We sometimes focus too much on trying to change advisor behaviour without fully considering the role that leaders can play. Before any training event or initiative launch, what is the role that you want the leader to play? They are critical in helping advisors make a shift.

People in field leadership positions are, in fact, the change agents. They are the ones who have the day-by-day connections required to actually help make the adjustments. Every time you see a leader create focus it is remarkable the impact that they have. Results are generated and there is always a direct tie to the activities of the leader.

The world is changing around us, the regulatory environment is evolving, and client demographics and needs continue to shift. COVID has caused all of us to think about our own life, health, and wealth. The need for advice has never been greater. Field leaders can help advisors embrace the changes, capitalize on the opportunities, and execute with purpose. **■**

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