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Build your Brand to Build Client Trust

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FPA FINANCIAL PLANNING ASSOCIATION

Journal of Financial Planning®

EXPANDING THE BODY OF KNOWLEDGE IN THE FINANCIAL PLANNING PROFESSION

October 2017 | Vol. 30 | No. 10
FPAJournal.org

Build Your Brand to Build Client Trust

by Barbara Kay, LPC, RCC

What is a brand and what does it have to do with client trust? First, let's tackle the definition of a brand. Your brand is not your tagline, elevator speech, logo, or even all your marketing combined. Your brand is your total firm identity. It identifies what you do, what clients experience, and how you are different from competitors.

Even more, a well-executed brand increases your firm's financial value, helps focus firm strategy, and serves as a blueprint for consistent firm communication. It also directly relates to client trust—a clear brand strategy and communication build trust, and firm value measures earned trust.

Gathering feedback from clients on what they value most about your service offerings is a critical step to developing your brand. Later in this article, I'll discuss three techniques you can employ today to build a more focused brand using that client feedback. Those three techniques are: (1) clarify who you are; (2) clear the clutter; and (3) communicate in a compelling way.

Brand for Financial Value

Apple, the world's top brand, is a good example of the financial value of earned trust. The value of Apple's brand increases its market value by 21 percent, according to *Forbes*' list of top brands for 2017. This reflects the financial benefit of voluntary loyalty, which cannot be bought with advertising. In fact, some of the worst brands spend the most on advertising. Several years ago, Comcast was ranked as one of most hated brands despite being a top buyer of advertising. The $1.7 billion spent on brand promotion could not convince people to trust Comcast.

The lesson here is that marketing cannot persuade clients to believe something they do not experience. Earning client trust is the path to reaping the financial benefits of creating a strong brand.

Brand for a Client-Focused Strategy

A well-developed brand will create a clear strategy that drives the goals and activities of an organization. It keeps everyone focused on what you do and what your clients expect from you.

Wasting time, effort, and most importantly, client trust on distractions that are not central to your value could be detrimental to any business. J.C. Penney illustrates the peril of pursuing distractions. In 2011 the company hired a new CEO to re-brand the store. While trying to win different customers, they abandoned existing ones. It was a disaster. Shares declined 51 percent in only 16 months. J.C. Penney broke customer trust and paid the price. The new CEO was fired, but the customers were already gone. This tale is highly instructive—building a strong brand includes developing a client-centered strategy that honors and nurtures client trust.

Brand for a Meaningful Message

Lastly, your brand influences and guides all communication. It helps tell the world, "This is what we are about, this is our value, and this is what clients will experience."

Staying true to your brand frees you to develop messages consistent with your actions and your mission. It's authentic, credible, and trustworthy because it reflects reality.

Staying true to your brand also clarifies your value to new prospects and existing clients. If someone asks your client, "Why do you work with that firm?" you want the client to have a specific answer. A client responding with, "I trust them," is nice, but not very helpful—many people will say they trust their financial professionals. Effective brand messaging provides meaningful specifics about *why* they trust you.

Keep in mind that good brand messaging is not merely self-serving; rather, it should be designed to help prospects know what to expect, and to help clients understand the purpose of everything you do.

Humans strive for meaning to make sense of their experiences. Much of behavioral finance focuses on how people interpret facts to develop meaning and conclusions. We want to know what is happening, what to expect, and what things will mean for us. Authentic brand messaging reinforces purpose and predictability, building client comfort, confidence, and trust.

Consider the example of Lynn (not her real name), whose brand-building efforts were successful. While honing her brand, Lynn developed key words to describe what she does and she now uses them frequently to communicate purpose and value. I cannot reveal her brand secret, but here is a working example: "As your financial planner, I promote and protect your financial well-being." *Promote* and *protect* are the anchor words reflecting the brand actions and value.

Not only does this help focus Lynn's marketing, it also builds client confidence. In one case, a client was very anxious to resolve a complicated operational hassle. Updates on progress were not reducing the client's anxiety, until Lynn reassured the client, "Remember, I promote and protect your financial well-being, and I will get this solved." Repeating and reinforcing the brand promise immediately shifted the client from anxiety to confidence. It reminded the client of the service she had delivered before and would deliver in the current situation. Remember, the goal of brand messaging is to concisely communicate your firm's unique qualities and the value you deliver.

Building your brand promotes your firm's authentic value, reinforces the strategy that you will deliver, stimulates financial success, and inspires clients to trust you. Professional help can provide tremendous brand development support, but the following techniques can help get you started now:

1. Clarify Your Brand

An easy way to clarify your brand is to ask clients about it. They know what it is and why they like it. First, make a list of clients who are most likely to give you quality feedback. Then develop questions to uncover how they experience your firm. A conversation is likely to be more fruitful than a written questionnaire. You can do this in person or over the phone. You might say: "I really appreciate our work together. What has been most important to you?" or "When you think of what we do, what adjectives come to mind?"

The more clients you talk to, the more your brand's key qualities will be revealed as patterns emerge across client experiences. Your firm does many things that are important. It's hard to discern what is most valuable, but clients know what stands out. This is exactly what Lynn did. The feedback was immensely helpful. It validated Lynn's value and clarified the core features of her brand.

2. Clear the Clutter

After clients share what they believe is most important, clear the clutter. Take a look at firm communications and activities. Any that do not deliver the highest client priorities could be wasting firm resources, or worse, diminishing client satisfaction.

Another financial adviser team I know is currently gathering feedback on the value of all their communication including meetings, emails, newsletters, website, Twitter, Facebook, and LinkedIn. Based on the results, the team will adjust to spend more time, money, and energy on what clients value more and less time on what clients don't value as much. Knowing what your clients really like is tremendously freeing. It gives your firm the confidence to limit low-priority activities and focus on what is most important.

3. Communicate Compellingly

In addition to clearing the clutter of irrelevant activities, clear any clutter in your brand message. Human brains are designed to remember words that are vividly concrete and experiential, not conceptual.

The conversation I had with the founder of a memorable business is an excellent example. When we met, the founder said, "I distribute large vehicles to municipalities and transportation hubs," or at least that's what I think he said, I can't remember. As I inquired further, he told me, "I sell fire trucks." Years later, I still remember the fire truck man.

Unfortunately, brand messaging is far more difficult for financial professionals. Words like *financial planning* and *wealth management* are highly conceptual and vague. It's a challenge to develop wording as clear as "I sell fire trucks." But we have important tools at our disposal to try.

The behavioral finance and cognitive bias knowledge that helps predict client behavior also forecasts the success of any brand message.

Fluency bias impacts message appeal. People dislike communication that is hard, and they value what is easy and pleasurable, regardless of quality.

Frequency and recency bias sway credibility. We believe what we've heard frequently and recently just because it's been repeated and been timely. Brand messages that are confusing and intermittent will be less appealing and less credible, even if they are true. Compelling brand communication breaks through the barriers of human bias. It delivers a simple, appealing, and compelling message consistently.

To maximize your message, synthesize the key qualities of your brand into a concise message. This is exactly how Lynn refined her brand message. After gathering client feedback, she distilled it into anchor words that accurately describe what clients value most and what she delivers. Repeating this consistently is having a noticeable impact. When clients thank her, they're now saying, "Thank you, I really appreciate that you promote and protect my financial well-being." It has given clients more relevant and meaningful language to describe their experience. I'm confident these clients can now precisely articulate *why* they work with their financial professional.

Conclusion

Enhancing your brand communication and honing your brand strategy is not a marketing ploy or psychological trick. As Comcast discovered, brand marketing alone will not persuade people to believe something they do not experience. Promoting your brand will not increase its appeal and credibility if you don't actually deliver what you promoted.

Ultimately, the purpose of building your brand is to articulate in words and deliver in deeds what makes your firm unique in the marketplace so that you reach and serve clients who desire what you offer. ■

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PRACTICE MANAGEMENT

From Irrational to Rational

6 steps to guide clients to productive decisions

by Barbara Kay, LPC, RCC

In modern society, money is the primary tool for survival, security, and satisfaction. In previous hunting, agrarian, and bartering societies, money was one of multiple sources of sustenance; today, it's *the* source. Consequently, every primitive survival and pleasure-seeking drive is intensely focused on capturing and guarding money. These drives are involuntary and highly emotional—they emerge more quickly and forcefully than logical analysis, making it hard for people to be objective.

Even rational thinking is frequently unreliable. Daniel Kahneman describes two kinds of rationality in his authoritative book on cognition, *Thinking, Fast and Slow*. One makes rapid judgments based on learned patterns and sweeping assumptions. The other is intentional, slow, and difficult. Productive financial decisions require the second kind, but regrettably, humans avoid hard thinking. We much prefer to make quick, easy judgments, but this quick intuitive thinking is filled with biases we don't recognize.

Given the plethora of unconscious drives and biased assumptions, especially about money, how can financial planners guide clients to more reasoned choices? First, be aware of the biases that arise from emotional instincts and intuitive thinking (these biases can be grouped under three categories: pain avoidance, appeal, and accuracy biases). Then, follow the six steps presented here to make better decisions.

Pain Avoidance Biases

Humans are wired to avoid pain with irrational intensity. As a result, we are susceptible to loss aversion and overestimation bias. Loss aversion is the experience of feeling losses two times more painful than the gratification of gains. Consequently, we avoid losses more aggressively than we pursue gains. In addition, the overestimation bias drives us to irrationally avoid highly unlikely negative events with one of the following characteristics: vividly traumatic; repeatedly communicated; personally relevant; or strongly emotional.

This is why some clients are overly fearful of another financial meltdown. The Great Recession fit not just one of those characteristics, but all four. It was traumatic, the media repeated the story incessantly, and clients personally experienced the impact with powerfully painful emotions. Constant reporting of recent market gyrations trigger a strong overestimation bias that another meltdown is coming and a powerful loss aversion drive to avoid it.

Appeal Biases

Not only do people irrationally avoid unlikely painful events, they are also swayed by positive impressions that lack credibility. The appeal biases create more natural, but faulty conclusions.

Individuals gravitate to things that are easy and attractive. Consequently, if it is appealing, we assume it must be true and desirable. As a result people:

- Judge by ease of viewing over substance (fluency bias)
- Believe just because it appeals (affect heuristic)
- Focus on the story over credibility (Kahneman's "what you see is all there is" or WYSIATI rule)
- Believe a good first impression predicts the future (halo effect)
- Believe only positive and reject negative evidence (confirmation bias)
- Assign cause and value judgment (causality bias)

This is how clients are persuaded that the "sure thing" artfully displayed on television or described confidently by a colleague must be true. It looked good and there was early success; the promoters must be right, because it can't just be an empty promise or random luck.

Appeal biases work negatively as well. Negative impressions are equally difficult to dislodge once established.

Accuracy Biases

Accuracy biases are the result of our preference for patterns and conclusions over fact. They lead us to:

- Believe something just because it has been repeated (repetition bias)
- Believe something is likely because it happened recently (availability bias)
- Overestimate the truth based on few examples (law of small numbers)
- Follow other people, regardless of personal relevance (herding)
- Cling to old expectations despite new circumstances (anchoring)
- Decide for current pleasures over future pleasures (affective forecasting error)

This is why clients are so panicked about inconsequential downturns. The news focuses on negligible drops, which reminds clients of other downturns, which *proves* the negative predictions, despite little evidence. Other people are acting, so clients feel compelled to act too. In addition, they may be fixated on protecting a perceived value. Moreover, clients can't accurately predict how badly they will feel when an impulse decision leads to future regret.

The cascade of pain avoidance, appeal, and accuracy biases create a combination of intense feelings and unreliable conclusions that financial planners routinely face. Recognizing them is the first step. Then, six corrective steps can be employed to lead clients toward more thoughtful decisions.

Step 1: Predict Irrationality

Predict that human beings are frequently not rational decision-makers, especially about money. In psychology this is called *normalizing*. In effect, we take the surprise out of irrationality. It takes away the guilt and the feeling that there is something wrong when clients have a hard time being logical. Set the expectation that this natural faulty intuition will arise frequently, then explain how you will help avoid this risk. Clients will be more cooperative when they expect proactive intervention for a natural phenomenon.

Step 2: Listen for Emotions

Rationality is suppressed when emotions are high. When faced with an irrational client, listen for the underlying emotions—likely fear, anger, or both. Remember that anger may be a cover for feeling fearful. Don't react to the anger. Instead, ask the client to describe their most important concerns. Often this will clear away misleading complaints and uncover the core fear that is driving the cascade of emotions. Rational decisions cannot be made until the irrational emotions are addressed.

Step 3: Acknowledge and Normalize

After the emotions surface, acknowledge the experience of the client by verbally reflecting what you hear. Do not agree with anything irrational or false. Instead, acknowledge how they feel. It is difficult for people to move forward until they feel heard. This is an opportune time to wholeheartedly validate their experience. After all, their experience is completely normal and expected. Then, reinforce your role in helping them sort through the feelings and facts to come to a thoughtful decision.

The key in these conversations is to show genuine concern and respectful humility. We encounter the same human fallacies, so we can certainly relate to their experience. After we reveal the emotions, we can acknowledge their experience and come alongside as a guide, and various tools can be used to develop a more reasoned way forward. The next three steps are useful methods for activating analytical thinking. These techniques elevate the client's perspective out of the shortsighted perceptions that reinforce the most risky impulses and intuitions.

Step 4: Repeat the Big Picture

People routinely fail to remember the past. We are myopically focused on the limited evidence and feelings of the immediate present, especially when emotions are heightened. We need regular reminders of the big picture. Use graphics and visuals to put today into the long-term perspective. Given all the pain avoidance and accuracy biases triggered by daily media onslaughts, it's not surprising that clients need frequent support. You will be less frustrated by the need to review again if you set your expectation that this is normal.

Step 5: Use Vivid Fluency

Make your points with easy-to-understand vivid graphics. People remember concrete images much better than abstract numbers. In addition, we feel good about things that are easy and dislike messages that are confusing or hard. Complex data presentations will likely make clients feel worse. Ideally, the adviser relationship will be a source of calm and comfort, not increased stress, otherwise, pain avoidance biases may emerge, leading clients to avoid their adviser. At every opportunity, use simple, colorful graphics to display information; seek to provide appealing clarity and comforting relief from anxiety.

Step 6: Visualize Future Feelings

People are very poor predictors of the impact of current decisions or future feelings. Therefore, we tend to pursue immediate pleasure over future benefits. To counteract the urgency of "now," use images to portray the impact of today's decision on tomorrow's future, where possible.

Research has found that people save more for retirement when they are shown photos revealing a future of scarcity or comfort. When photos are not practical, have clients describe how the results of various decisions will look and feel in the future. Until people can picture themselves experiencing their future, they will focus more on obtaining immediate pleasure. Visualization of future feelings is also helpful when clients are overwhelmed with fear. The intense need to relieve anxiety today can easily lead clients to underestimate the feeling of future regret and the impact of impulsive decisions.

The challenge for financial advisers is to recognize and productively guide clients away from impulsivity and toward rational thinking, which goes against human nature. Fortunately, good tools will shift the perspective and illuminate a productive path forward. ■

Barbara Kay, LPC, RCC, (www.barbarakaycoaching.com) is a business psychology and productivity coach, speaker, and author. She is also a co-host of the FPA Business Success Knowledge Circle and an FPA mentor.

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Business Coach or Consultant?

Determine the best resource to accelerate growth

by Barbara Kay LPC, RCC

There are a lot of business coaches, consultants and practice development programs to choose from. And many professionals use the terms coaching, consulting and training interchangeably, making it difficult to tell what's really being offered. Is it coaching or is it consulting? Is there a difference? Yes, there is a difference, and a clear understanding will help you make an informed choice on the best option for you and your business.

Consultants Offer a Teaching Approach

Consultants and their programs tend to have a teaching or training approach. The value for you is access to new information. The consultant's job is to deliver quality information, and your job as the client is to do what is taught. Fundamentally, consultants lead clients to adopt their methods and expertise.

Coaches Offer an Accountability Approach

The coaching approach is completely different. A pure coach assumes the client is fully capable and has all the resources needed at hand. The coach typically puts his or her client in charge of the direction and the content. Instead of teaching, the coach focuses on helping you choose goals, develop effective strategies, maximize resources, commit to actions, remove obstacles and stay accountable. Fundamentally, the coach's job is to elevate and maximize the successful execution of your resources and expertise.

The Difference Is in the Details

Consultants and coaches need different skill sets. Consultants must be topic experts and good teachers; this is no small job. They need to amass considerable knowledge and develop excellent delivery. They show, tell, teach and direct.

Alternatively, coaches must be expert achievement strategists. They need to uncover and maximize opportunities, resources and talents. Coaches ask, listen, strategize and activate execution. Because the skill sets are quite different, it's a mistake to assume coaches will automatically make good consultants and vice versa. The key is to determine what the professional is really offering, regardless of the terms used.

As a potential client of a coach or consultant, you can uncover the individual's core offering from his or her marketing materials and sales conversations. Development programs are usually training-focused; essentially consulting delivered through a curriculum. Programs that include "coaching" often deliver training reinforcement rather than true coaching. That's not a bad thing—training reinforcement supports successful application—it's just not the same as professional coaching.

For individual services, it's relatively easy to tell the difference between consultants and coaches. Typically, professionals who are primarily consultants will describe what they will teach you and the value of their expertise. Professionals who are primarily coaches will likely describe the coaching process and focus on your particular goals. Someone who can truly do both can explain the different skills and methods used in each role. Those who use both terms but describe only one role will likely deliver only one. That, too, is not a bad thing, but it's good for you to make an informed choice.

Whichever You Choose, Find Value

Any good program, consultant or coach is a valuable resource, but I believe there are better choices based on certain criteria. The best resource for you will depend on your career stage, interests and goals. Here's my take on the value of options and how to choose between a program, consultant or coach:

- **Value of a program.** If you're a rookie, a good practice development program will teach important fundamentals. One with coaching will likely provide helpful application reinforcement.
- **Value of a financial services consultant.** If you're lacking specific resources within your firm, industry partners or professional associations, hiring an industry consultant can provide additional training.
- **Value of an external consultant.** Experts in other fields can provide tremendous value, building critical skills not traditionally taught in the field of financial planning.
- **Value of a coach.** If you have experience, a quality coach will help you design and execute a custom achievement strategy that will maximize resources and build your success.

Barbara Kay, LPC, RCC, coaches financial services professionals and companies on productivity, client relationships, behavioral finance, teams, leadership, time management and change. She is the author of the books The $14 Trillion Woman *and* The Top Performer's Guide to Change. *Contact her at barbara@barbarakaycoaching.com.*

Clues of a Consulting Approach

- Client follows
- Consultant teaches
- Uniform methods
- Topic expert
- Consultant homework

Clues of a Coaching Approach

- Client leads
- Coach promotes
- Individual solutions
- Expert strategist
- Client actions

Learn More

The January 2012 *Journal of Financial Planning* will cover coaching to market your practice. Discover types of services and costs, and methods for finding the right expert for you.

Practice Management Solutions

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Masterful Marketing

Experts, coaches, planners, and authors give their best tips for effective marketing

Compiled by Ana Trujillo and Carly Schulaka

MARKETING MAY NOT always be top of mind for planners. Perhaps you don't have the budget to pursue lofty marketing goals, or perhaps you're simply too busy. But we reached out to marketing gurus, authors, speakers, and marketing-savvy planners to ask them how busy planners could implement some quick, cost-effective marketing tips.

Their answers run the gamut from clearly defining who you are, what you do, and who you want to serve, to emphasizing content marketing, and spending a few minutes each day networking on social media. And if you're still feeling pressed for time, each expert provided things you can do to kick-start your marketing in just 10 minutes or less (see page 34).

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How much time and money should a planner spend on a logo?

You can get an inexpensive and creative logo by using a crowd sourcing logo and design service, such as 99designs.com. But more important than cost is the logo's versatility and usefulness for your overall branding and marketing.

A good logo will be able to be used attractively across all forms of media; will be able to be broken apart and used in segments; will be in a color scheme that is easily and affordably reproduced in print, but will look good in black and white; will be clear and easy to read at whatever size; and will be in an [appealing] typeface that you'll want to repeat.

What is the most common marketing mistake you see financial planners make?

Focusing too much on technical content and text, and not enough on creating an immediate good visual first impression. An equally big mistake is not making it easy for people to contact you.

What are the three most important things planners should consider when developing their "brand"?

In professional services, clients buy people, not a product. You are selling you, your team, and your firm. What about you is unique? Second, a brand is not a demographic niche, and you don't need to pick a narrow demographic niche to have a specific and focused brand. And third, the brand is not a marketing tool. A good brand will reflect mission and passion. It should guide you toward what you do best and keep you focused on that path.

5 Steps to Calming Upset Clients

by Barbara Kay LPC, RCC

It's unnerving to be confronted by an upset client. There's a lot on the line when a client calls or visits in an aggravated state. Adding to the challenge, the financial adviser may not be a disinterested party, but personally involved in some way. Emotions are magnified when advisers have to respond to upset clients and deal with their own concerns at the same time.

I have worked with many advisers over the last several years who faced panicked clients on a regular basis while also dealing with their own professional and financial concerns. It takes real skill to help clients go from crisis to calm at a moment's notice. The following is a step-by-step method to cool down the heat and move toward a resolution with grace and diplomacy.

Step 1: Listen

People tend to immediately present their viewpoint when someone challenges them, especially when the speaker is upset. But your well-intentioned explanation may further aggravate the client. Instead, the best first step is to bite your tongue and focus on listening. Listen to learn the situation and the client's perceptions or emotions.

Step 2: Acknowledge

We forget that acknowledging is not the same as agreeing. You can acknowledge the person's view and not agree. Before people will move forward, they must feel heard. Acknowledge both the factual and emotional content. For example, "If I understand, you are upset because ... ."

Step 3: Agree

The way to further calm the client is to agree (this is the tricky part). Find one thing you can honestly agree with—or even part of a thing—and agree with 100 percent conviction. You might not agree with the client's opinions or conclusions, but you can probably agree with how the client is feeling. For example, "This situation is very upsetting. I completely agree with you."

Step 4: Add

Add your perspective after you've agreed wholeheartedly. Do not use the word "but"—it will delete your agreement. Agree, then bring the client closer to your viewpoint. For example, "I completely agree that_____, and let me share some background you might not know about."

Step 5: Resolve

Move to problem-solving after the person calms down. When people are upset they tend to throw out ultimatums and demands. You may need to ask some open-ended questions to uncover reasonable solutions. For example, "What's most important to you?"

The Calm Client

These five steps, employed with skillful diplomacy, build a foundation for resolution. Many times a client will calm down and work cooperatively to solve the issue. On occasion, clients may be stuck in an emotionally charged state and not able to move forward. If you find yourself going in circles, you may need to gently close the conversation and postpone resolution.

When emotion wins over logic, it's best to revisit the situation later. Suggest the most obvious reason to give both you and the client time (getting more facts, checking on possible solutions, having the client consider options, etc.). Even in these cases, skillful use of the five steps will improve your chances for a positive resolution. You will have reinforced your genuine concern for clients and your understanding of their feelings, and that's the most important first step.

Despite our desire to be logical, everyone is profoundly affected by raw emotion. Developing emotional skills is a critical competency for any adviser. Advanced emotional skills bring increased satisfaction and success with clients and everyone we encounter.

Barbara Kay, LPC, RCC, coaches financial services professionals and companies on productivity, client relationships, behavioral finance, teams, leadership, time management and change. She is the author of the books The $14 Trillion Woman *and* The Top Performer's Guide to Change. *Contact her at barbara@barbarakaycoaching.com.*

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Get Your Time Back!

How to conquer email and other distractions

by Barbara Kay, MA, LPC, RCC

In a recent meeting with a leadership team, the conversation turned to productivity. The top leader looked at me and said something that resonated powerfully. "It feels like our jobs have become doing email," he said. Everyone in the room nodded their heads in miserable agreement. Next, he asked, "Barbara, is it possible to become ADD?"

Those comments reflect the overwhelming frustration people feel from the constant barrage of email and other distractions. It also reflects the very real perception that we're intensely busy and unproductive at the same time.

Research by Northwestern and Stanford universities provides clues to this experience. At Northwestern, research has uncovered important brain mechanisms. Everyday task completion uses one kind of cognition. Creativity and insight arise from a completely different brain activity. Unfortunately, they appear mutually exclusive. You can't be creative and insightful while your brain is busy with everyday tasks. The "noise" of the day-to-day drowns out the neural networks of creativity. We need to be quiet and unplugged before the brain can deliver creativity and insight.

At Stanford, professors studied the effect of constant media multitasking. They found those who chronically multitask across different media platforms have significantly poorer performance. They were

- unable to focus and were distracted by trivial things in the environment
- unable to recall things correctly and had inferior memory
- much more likely to jump into irrelevant tasks

We have become more distractible and less productive, so now what? Here are seven simple techniques to contain one of the most insidious distractions, email:

Conquering Email

1. **Turn off the spigot.** Unsubscribe to anything you don't absolutely need. Turn off any LinkedIn, Twitter and Facebook automatic update notifications that aren't important.
2. **Use rules.** Set your email "rules" to send certain emails straight into designated folders. This reduces mail in your inbox and saves time handling every email individually. For starters, try this with non-essential emails, such as research or news.
3. **Unglue your eyes.** Check email only at specified intervals. For those who must respond quickly, check for five minutes hourly. For those who can check less often, schedule 15-minute periods three or four times per day. Minimize the email window after your time is up and turn off the notification sounds.
4. **Stop the "cc" overload.** Talk with your team and get everyone on board with guidelines for "cc-ing." Only send what is needed.
5. **Prioritize response time.** Respond to urgent matters during your email window. Delay all others for an end-of-day clean up. Then respond to the remaining and clean out your inbox.
6. **Get help.** Have an assistant set up email rules for you. If possible, let the assistant read and sort your email in a way that saves you from doing everything yourself.
7. **Stay on top.** After you get your inbox cleaned out, stay on top of it daily or at least weekly. If your inbox is completely overflowing, move all of the emails into a folder labeled "inbox." Go through those bit by bit during your clean up time. It's likely you can quickly delete much of the old buildup.

Conquering Other Distractions

In addition to taming email, these four simple techniques help create space and time for productive focus:

Isolation islands. Pick a time when you're alert and less likely to be in demand. It might be early morning, the lunch hour or late afternoon. Unplug and isolate yourself during that time. If you can go to a secluded place, even better. Keep it relatively short, so you don't feel too inaccessible, but long enough to get something accomplished.

Closed-door policy. A constant open door invites unending interruptions. Work with those around you to establish windows of time when your door is shut. Keep it consistent so people learn the pattern. Being accessible and responsive is not the same thing as being at the mercy of every whim. Of course, make it known that you want to be interrupted for a true emergency.

Team huddle. Constant interaction among team members means somebody is getting interrupted all of the time. Schedule short huddles to trade information and tasks. If you don't want it to drag out, stay standing and use a timer. Use simple tools like folders, trays and task lists to help team members collect and manage the items that need to be addressed during the team huddle.

> "We need to be quiet and unplugged before the brain can deliver creativity and insight."

Focus breaks. Attention research shows that people can only stay completely focused for a limited time (25 to 45 minutes); after that they lose concentration. Physical movement and a change of activity recharge the concentration batteries. Time the team huddles, closed-door times and other activities so that you have periods of concentration with short intervals of other activities.

People are not productive when constantly bombarded and interrupted while at the same time chained to electronic devices. Taking control and developing some simple disciplines can help professionals and teams be more productive with less frustration.

Barbara Kay, MA, LPC, RCC, is a business psychologist and productivity coach who works with clients on productivity, teams, client relationships, change and leadership. She's the author of two books, The Top Performer's Guide to Change *and* The $14 Trillion Woman. *Contact her at www.barbarakaycoaching.com.*

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Reprinted with permission by the Financial Planning Association, **Journal of Financial Planning**, September/October 2012, Barbara Kay, LPC, RCC, *Get Your Time Back! How to conquer email and other distractions.*

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A New Direction In Leadership

by Barbara Kay, LPC, RCC

Unlike a generation ago, professors at some top universities now teach MBA students not to write business plans. Instead, students are taught to adopt the "*drunken man stumble, in which you keep staggering forward in the general direction of your vision, without feeling the need to go anywhere in a straight line.*"[1] This quote from a Center for Creative Leadership white paper flies in the face of traditionally accepted leadership practices.

There's a big shift going on in leadership development that rejects many established standards. In fact, McKinsey & Co., a global management consulting firm, suggests a list of capabilities for centered leadership[2], and there's not one business or technical competency on it. The list focuses entirely on relationship skills including connecting, engaging and energizing. Certainly business competencies are important, but it is fundamental individual and interpersonal skills that elevate leaders to greatness.

These fundamental qualities are summarized in what is commonly referred to as the four As of leadership, synthesizing multiple elements of leadership development into four core characteristics. Great leaders are positively:

1. Aware
2. Authentic
3. Adaptable
4. Accountable

Aware. Good leaders are acutely aware of their gifts and challenges and those of their team. They regularly seek honest feedback and use it to build excellence within themselves and others. Awareness is the first fundamental of leadership.

Authentic. Authentic leaders are honest, genuine and caring. They say what they do and do what they say. They have a powerful combination of strength, confidence, generosity, humility and integrity.

Adaptable. Adaptable describes a flexible and open leadership style. Adaptable leaders give their team

Where Do I Go For Assessments?

If you wish to evaluate core strengths, talents and interests of you and your staff, career and outplacement firms are a good source. They use assessments to help individuals find their ideal career paths.

Human resources professionals are good sources for predictive assessments used for employee selection. They also may have resources for career placement and training.

Coaches and consultants focus more on growth and achievement and are a source for assessments that develop individuals, build dynamic teams and enhance leadership. —*Barbara Kay* the authority and support to be agile, resourceful, self-directed and proactive. They realize traditional top-down direction slows action, hampers innovation and reduces the power of individual responsibility. Instead of directing, they focus on equipping and inspiring team members to willingly lead themselves and others toward a common goal.

Accountable. Leading with consistent and productive accountability is one of the biggest challenges for any leader. Fostering a positive balance of challenge and support is tough. Most of us tend to be too hard or too soft. The good news is that through developing the other leadership qualities of awareness, authenticity and adaptability, you greatly increase the odds of achieving balanced accountability.

Use Assessments to Improve Leadership

Linda Hill, Harvard professor and faculty chair of the Harvard Leadership Initiative, is an expert on leadership development. In her view[3], becoming more self-aware is one of the most important tasks of any leader. Assessments can be a great resource for becoming self-aware and being a more successful leader by building individual and team effectiveness. There are many assessment instruments for multiple roles and purposes. Quality assessments reveal important data fundamental to individuals, teams and leaders who seek to be aware, authentic, adaptable and accountable. Here are four tips on selecting and using assessment tools:

Expensive or exclusive does not equal quality. Plenty of quality assessments are reasonably priced and easily available. I'm often leery of tools that are expensive or lock the client into required certifications and exclusive agreements. The tools I use are widely available. Clients can get them through a number of sources.

Use an established provider. Quality assessments take significant resources and time to develop, test and verify; they aren't whipped up overnight by gurus. Good providers will have a history in the business and will authenticate the accuracy and reliability of the assessment instrument.

Invest in practical application and development. Most assessment results are self-explanatory, so it's possible for individuals to build and execute their own development plans, but let's face it—that's not likely. I frequently come across folks who took an assessment, read the results and stuck it in a drawer, end of story. Investing in application and development can turn the assessment into a fantastic catalyst for growth.

What the assessment can't tell you is equally important. Assessments are based on defined parameters. People tend to over generalize, and it's common to want an assessment to do more than it can. Learn what the specific assessment you intend to take does and does not measure so the results can be used properly. ❍

Barbara Kay, LPC, RCC, is a business psychologist and productivity coach. She is the author of The Top Performer's Guide to Change *and* The $14 Trillion Woman. *Contact her at www.barbarakaycoaching.com.*

Endnotes

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2. *The Value of Centered Leadership: McKinsey Global Survey Results*, McKinsey Quarterly, October 2010. www.mckinseyquarterly.com.
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