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TAKE THE HELM

The Quick and Easy Way to Achieve Peak Performance for Financial Advisors

OPPORTUNITY IS NOWHERE

Is it OPPORTUNITY IS NO WHERE, or is it OPPORTUNITY IS NOW HERE? The choice is yours and yours only to make. History is replete with examples of individuals and organizations that have seized opportunities and *thrived* even during uncertain times. Opportunity is truly here for those who see it!

This article *promises* to give you three keys to peak performance. When these keys are applied, they will revolutionize your professional life as a financial advisor. I have witnessed this process increase performance by as much as 50%. Many report also unexpected, but dramatic improvements in their personal relationships by living these principles.

I have had the wonderful opportunity of working in the financial service arena for years. I have gone on an intensive search to find the common denominators for success in the financial profession. Our search for truth has been multi-faceted. I have researched scientific findings, textbooks, articles etc., but perhaps the most important area that I have studied is "in the trenches" with actual financial advisors.

Experts predict that incredible changes are looming on the financial horizon. It has been predicted that 50% of the current financial institutions will no longer be in their current form by the year 2010. Some will shut their doors, others will merge, re-organize etc. The opportunity to ride, rather than be pummeled, by this tidal wave of change is upon us. You can see that OPPORTUNITY IS NOW HERE!

It is not uncommon to hear that, "success in the financial arena is luck". While there may be some truth to this statement, our experience does not support this generally. Like an actor or a professional athlete, financial consultants must consistently perform at peak levels every day. It is not by luck that those who are consistently performing at top levels are creating amazing results. They utilize a simple and predictable process that creates desired results.

First let's identify the mindset of the mediocre performer. The average worker feels complacent and *is* stuck. They are bound by illusions that would have them believe that other people or circumstances must change in order for them to achieve success. Some of the *indicators* of being stuck in *illusions* include:

- Complacency, boredom, lack of vision and stagnation,
- Anxiety, fear of failure, change etc.
- Victim mentality, excuses, blaming, negative attitude
- Low energy, loss of passion and enjoyment of work
- Procrastination
- Feeling out of control and loss of hope
- Treating others poorly, such as: customers, co-workers, boss, family...

When your car's gas gauge indicator light comes on you go get gas. (Unless you're the type that believes you have another 25 miles to go!). When a person is stuck in one of the above attitudes, this serves as a clear indicator that illusions are diverting them from the success they could have. When you reach a point in your life when what you are doing no longer works, (the indicator warning light is on) its time to do something different. When you get stuck in these illusions, you are not at the Helm of Our Lives. You need to be hyper-aware of these indicators so you know if you are at the helm, or if *the illusions are steering for us*.

I have found that *average performers* get stuck in negative thought processes (illusions). There is no honor in being a pessimist and it takes little or no effort to find the negative. Paraphrasing JFK, he said, "I don't need cynics, and skeptics pointing out obvious realities, I need people who are able to see things that are not obvious and make them come to pass". Studies now substantiate that optimists have the performance edge in all areas!

I am not suggesting that you bury you head in the sand like an ostrich pretending that there are no challenges, but I am suggesting that you learn how *Take the Helm*. You can *steer your mind* in the direction of your *dreams* and *objectives*. This disciplined mental focus allows you to *unleash the human spirit of greatness within you that allows you to rise to any challenge and become a better person because of those challenges!!*

How can this be done when most financial advisors are stressed and grossly overwhelmed? Our research has led us to develop a deceptively simple, and amazingly powerful process, called the *VIP Process*. As you are aware, VIP stands for Very Important Person, and treating others as VIPs is at the heart of the *VIP Process*. However, I have changed the letters to mean the following:

V= VISION
I= INSIGHT
P= PERSONAL ACCOUNTABILITY

Our search for the principles of peak performance boil down to these and apply on all levels, including individual, team, and organizational. The *VIP Process* described below will overview how to *Take the Helm* of your life and career.

Peak Performers daily create an engaging *Vision*, gain the *Insight* necessary to accomplish the *Vision*, and take *Personal Accountability* to accomplish the *Vision*. In short they a) See it: *Vision* b) Think it :*Insight* c) Do it: *Personal Accountability*

Vision: *Vision* is based on the natural law that states, "you move in the direction of your dominant focus." The average person's thinking is largely negative, (preparing for disappointments, defending against potential attacks, etc.) and poor results follow. A *Vision* must be purpose driven- yet energizing- and something to be passionate about. It is anchored in the future (your ideal future), but it must impact behavior today, or it's a waste of time. *Vision* contributes to the good of the advisor,

customer and the organization alike. If you don't connect with your *Vision* daily, *by default the environment or another person will provide a less desirable one for you.*

Insight: Having a *Vision* is not enough; you must have a never-ending quest for information that steers your mind toward your *Vision*. The first step is *Taking The Helm* of your life. This means letting go of victim mentality, blame, and taking 100% responsibly for how you feel and the results you ultimately produce. Taking the Helm is at the core of all peak performance and is one of the most incredibly exhilarating experiences you can have, as perhaps for the first time, you feel *in control* rather than *controlled*.

Insight is based on the second law of thermodynamics, which states, "A system left to itself has a tendency to disorganize or break down". Peak performing advisors have a thirst for knowledge. They learn performance-enhancing information daily. They seek out the giants of their field and learn from them. They put their ideas, and newfound knowledge to paper. The end result of *Insight* is your ability to make better decisions. A person with *Insight* believes that they can and must be responsible for the quality of their life. They also live by the axiom "knowledge is power".

Personal Accountability is based on Nike's motto, "just do it!" By doing comes the power to do. Peak performers have the ability to motivate themselves to take action, innovate, and take at least one risk a day. They are not afraid to tell others their plans and dreams, because they *want* to be held accountable to them. Action is the antidote to despair.

If a person only has *Vision*, they are dreamers. If a person only has *Insight*, they are educated idiots. If a person only has *Personal Accountability* they are a person working two minimum wage jobs. OPPORTUNITY IS NOW HERE to *Take the Helm* by applying the *VIP Process* and entering the realm of peak performance. Our research has taken the guesswork out of what separates average and brilliant performers. This process is simple, adaptable to individual tastes, and creates outstanding competitive advantages. This brief overview provides a glimpse of the exciting information found in our presentations. Tools and illustrations to bring this process to life are covered in depth in our speeches. The *VIP Process* has helped tens of thousands of people reach new heights and enjoy their jobs and lives as never before!

"If you are to change something, do it immediately, do it flamboyantly- no exceptions." --William James

END OF ARTICLE

Our approach to speaking and training is unlike anything you have seen. It is fresh, fun and loaded with practical tools that can be applied immediately. Audience involvement, customization, acoustic music and a touch of magic round out our presentations to absolutely WOW your group!!! If you are interesting in learning more about Doug or his *availability, please call.*