

Fit to succeed



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Consulting a financial planner, he complained that after 30+ years representing a specific corporation he doesn't know if he could stand working for them anymore. "The top executive is dictatorial, pressing us as representatives to sell products just to make numbers, even when I don't feel it is the best vehicle for my clients. My daughter is finishing her degree in business finance and I don't feel comfortable bringing her into my business because, quite frankly, I'm embarrassed to have her see how disrespected I am."

Before this meeting, even as much as I enjoy our relationship, I had ceased using his services. Earlier this year I began investigating another financial advisor. As I suspected, the new independent, non-affiliated, planner told me that the products in my portfolio were not to my best interest. The lesson...when we are not operating in the best environment, we won't maximize our talents and, unfortunately, it will show. Consider these four factors to determine whether you are fit to succeed.

Culture, company fit – Culture starts at the top of an organization. I remember a consultant illustrating this principle. He was asked by an owner to help determine why, after years of stellar success, suddenly his company was on the

brink of bankruptcy. When interviewing key executives, the consultant learned that the owner was having an affair with a fellow employee. The once binding trust had been destroyed; the owner was no longer respected. Consider these cultural strengths: commitment to others, willingness to admit mistakes, being available to help others, and demonstrate an encouraging attitude.


Character, behavioral fit – While a company's culture also influences personal character, behavioral fit is more of a person attribute. I once worked alongside a manager who wasn't trustworthy. His superior came into my office one evening after work and advised me that either this manager or I was not telling the truth about a certain situation and when he found out who, he would see that the offending party would be terminated. Two weeks later, the superior came to me and apologized; he wanted me to know that I was the first to know that the following day the manager was being dismissed! Do you demonstrate trustworthiness, a caring spirit, humility, empathy, and integrity?

Capability, talent fit – Fortunately, in sales this characteristic is easy to determine, just look at your dashboard. How is your sales and margin growth? Are your new business margins increasing? Are you meeting your prospecting call frequency goals? Are you honest with yourself as to why a customer decides to leave you? Consider a personal assessment

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of these key essential attributes: potential, ability, talent, and emotional intelligence.

Calling, passion fit – Even if the above match up, without passion, you still won't be a fit to succeed. I have recently witnessed this with two millennials. I'm confident that both will be highly successful in their careers. They demonstrated outstanding personal growth while with our company. One, in sales, approaching 30, was single, and wanted to travel and work for an international corporation. The other in our IT department, even younger, had started his own internet company. While both enjoyed their time with our company, they had personal passion for opportunities that we couldn't match. As Jim Collins in *Good to Great* questioned, "Are you on the right bus, and in the right seat on that bus?" Your knowledge, skills, and talents might match where you are now, but without passion, it's just another job. You won't become all that you can be.

The financial planner mentioned in my opening illustration is a man of character; he has capability and passion for financial planning, but he is representing a company that is lacking respectable cultural. Because only three of four of these factors are a fit, he has asked me to introduce his daughter to my new financial advisor rather than have her join his company. Unless all four factors coalesce, it may be time for you to take a closer look to determine if you are **fit to succeed.** 

ABOUT THE AUTHOR

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