

# FINANCIAL PROFESSIONAL CASE STUDY\*

## Tenured Advisor: Marilyn



*Marilyn is one of a handful of women on the Apex Solutions team. She just happens to be the oldest. She was recruited away from a career in retail. Her manager told her the industry needed more women in it. Marilyn agreed, since half the population is female.*

*That said, it was lonely being a male dominated business. It was a challenge to reinterpret the techniques she learned would help her succeed.*

*But Marilyn had stuck with it so she could help other women make good financial choices.*

- Experienced professional
- Eager to please
- Occasionally rigid
- Reasonably proficient and capable
- Very enthusiastic when working on a new approach to marketing
- Personable and warm
- Funny

### **MARILYN'S PRIMARY GOALS:**

1. Shattering the glass ceiling
2. Making a difference for women
3. Proving people wrong

Marilyn has a consistent, though modest, practice. Her clients *love* to see her. Her client review meetings are historic for their length. Her peers refer to them as “love fests.” They’re actually jealous of the strength of Marilyn’s bonds with her clients because they usually do *everything* she recommends. Marilyn seems to have cracked the code on how to consistently develop *raving fans*.

However, Marilyn underperforms her peers. Even some of the new women on the team perform at a higher level than she does, which isn’t saying much. She doesn’t bring on many new client households because she needs at least one more long meeting with them to close the business.

To counteract that, Marilyn spends a lot of time away from the office brainstorming elaborate schemes to market herself. She is lit up when she tells her manager about the super plan she has. When she hears his concern about how the compliance department will embrace it, she goes into a funk. Every time.

Marketing is the Achilles heal for Marilyn. Completing her paperwork correctly is a close second.

### **OUTCOME:**

*Marilyn’s underperformance is tied directly to her consistent resistance to use already proven (and approved) marketing tools.*

*“Why can’t I just do it the way I want to?”*

\* Each case study is based on an actual professional we have worked with. None are hypothetical.

# WHAT WENT WRONG?

## Marilyn's Story

- ▶ Marilyn's overriding entrepreneurial DNA is **Innovator**. She loves her career and her clients. She describes it as "her life's mission" to help other mid-life women.
- ▶ Marilyn's strong predisposition toward iDNA routinely drives her into conflict with her manager, asking for forgiveness rather than permission.
- ▶ She feels most congruent and fulfilled when she is devising better ways of reaching out to her clients, as well as discovering new ones. Marilyn feels that her company's marketing material is 1) stuffy, 2) boring, and 3) "too male." Her manager agrees and wants to help, but she is impatient and doesn't want to work through the proper channels for approval. "It takes too long."
- ▶ Her iDNA also interferes with her accurate completion of forms and applications. She has at least one *weekly* recommendation for changing existing forms: "This is what it *should* be like."
- ▶ More problematic, Marilyn's iDNA—left unmanaged—routinely drags her meetings past 2 hours. She knows that her time, as well as her clients, is valuable. But she'd rather err on the side of warmth than disciplining her time management.
- ▶ When Marilyn has an illness that requires six weeks of recovery, she completely loses heart, feeling there is no way she can hit her minimums due to the lost time.
- ▶ Given her history for epically long client meetings, ineffective and impulsive marketing and her habit of creating things before asking for guidance, her manager grudgingly agrees.
- ▶ Marilyn gets a job in retail.

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