

FINANCIAL PROFESSIONAL CASE STUDY*

Managing Partner: Mike



Mike is a super-competitive, former athlete. He's been key leader at Integrity Insurance & Financial Solutions for over 10 years.

Mike has accomplished many of the goals he set out to. The professionals he leads are good. In fact, they're very good. His office always qualifies Mike for the most prestigious accolades and company-sponsored trips. Every year.

Still, Mike knows his people have more in them. He cares deeply about his team. It's not about him. It's about the extra money they'd make by performing at their best.

- Highly competitive
- Sometimes seen as aloof
- Numbers & metrics driven
- Known to think outside the box
- Fiercely loyal
- Dogged—hard worker
- Connected to community
- Has high expectations of others

MIKE'S PRIMARY GOALS:

1. Qualifying for the top awards
2. Leading his people to greatness
3. Impacting the lives of many people

Mike is a dream leader. He consistently leads his team to multiple awards every year. Many individual producers qualify year after year because of Mike's help. Consequently, Mike's office has an impressive display of plaques, trophies and other recognition displayed prominently in the lobby of the firm's premium office building.

However, Mike doesn't land in the top 5 of his peer group. At least not consistently. The year he placed 3rd overall, out of 152 Managing Partners, Mike couldn't figure out how it happened. So he couldn't replicate it. That was a hard year for everyone.

Because Mike can be quite forceful (some say "relentless"), his preferred approach is to increase the number of sales meetings and emphasize quotas. He knows that most of his team members tend to avoid him for several days after, but Mike is OK with that "if it gets the job done."

More than anything, Mike wants to reach 1st because he will either get offered a more lucrative office to oversee or he'll be able to move his current team to the most prestigious office building in his town. He'll decide when the offer comes.

OUTCOME:

Mike's high-performance as Managing Partner comes at the price of his team's morale. His reputation is making it harder to recruit great professionals away from their existing affiliations.

"Go big or go home. We're in it to win it. No whiners!"

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

WHAT WENT WRONG?

Mike's Story

- ▶ Mike's doesn't have a predominant entrepreneurial DNA. He's a nearly balanced combination of **Builder** and **Opportunist** eDNA.
- ▶ The **Builder** eDNA in Mike drives him to work his people hard. He thinks he's being a strong leader when he's actually setting things in motion for many of his people to underperform and a few of his people to go to a competing firm.
- ▶ Mike's strong predisposition toward **Opportunist** eDNA enables him to see possibilities for business where his team may not. He regularly shares names of influential people to connect to. Whenever Mike is networking he's actively looking for great opportunities for his more timid professionals. Then he makes sure they pursue those opportunities. Or else.
- ▶ Mike's relentless competition wears out his administrative staff because sometimes he lashes out at them. Especially when his office misses a company target by underperforming in one area.
- ▶ Everyone knows Mike "is a company guy." He rarely deviates from using tools or resources already in place, even if it is the same resource his predecessors used 20+ years ago.
- ▶ He knows all about profiling tools. He currently uses LIMRA, Myers-Briggs, Kolbe, DISC and StrengthFinders. Still, he's curious about what his team member's actual entrepreneurial DNA is. Based on what he knows, Mike thinks it could make a big difference for all of his team. And maybe he'd finally crack #1!
- ▶ Mike is impressed that entrepreneurial DNA is being used in MBA programs around the country & that it's vetted by major media.
- ▶ But because Mike's world is overwhelmingly **Specialist** DNA, he is strongly influenced by it. That's why he hesitates to act. What will the company think? What if it doesn't make any difference?

FORMULA FOR SUCCESS = Playing to your *natural* business strengths. But first you must know what your entrepreneurial strengths are.



Discover your entrepreneurial DNA. Click here: [MyE-DNA](#)
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