

Disciplines of Success

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What does it take to be successful in sales

Ever wonder why one person or company is so successful, while others seem to be “also rans”? The key difference is discipline – and not the kind related to punishment. According to Webster, discipline means “instruction, teaching, learning; training that corrects, molds, or perfects the mental faculties or moral character”. So let’s put away the paddle and demerit slips and focus on how we can “correct, mold, and perfect the mental faculties” relating to our business.

When I get lazy about my work discipline, I think of my friend Lee Loughnane, who has been blowing the trumpet for 50 years (more than 40 of them spent with the rock group Chicago). Lee has never let his success override his discipline of practice. Day in and day out, he spends one hour in practice, and the first 30 minutes are solely blowing the musical scales. Since I know him to be a consummate musician, I once asked him why he is so focused on this practice routine. I’ll never forget his comment: “Practice provides me the confidence to know that I can hit any note at any time when I’m on stage.”

Are any of us that committed to our craft?

Fortunately or unfortunately, the insurance industry has been built on sales. Rare is the agency owner who came up through the back-office of the business. Most owners were, and are, successful producers, and therein lies the problem: we of the sales mentality tend to be a messy lot. Just ask any CSR who has to clean up the debris in our wake.

Our discipline is sometimes lacking, unless we face a deadline or the immediate need to generate revenue. We celebrate the sales victories, but don’t really pay attention to the prospecting until the pipeline is dry. Then we scramble to fill the pipeline with more prospects. In our successes, we frequently begin taking shortcuts, until our closing ratios drop and we force ourselves back to the basics upon which our success had been built. When financial difficulties arise, our answer is to sell ourselves out of the problem, rather than address the cause of the problem. We tend to visualize ourselves riding a roller coaster rather than driving down a highway.

Where to Start

If my disparaging remarks (which definitely apply to me as well) haven’t caused you to move on to different article, we need to find a place to start refining our personal disciplines. Since the topic of success disciplines could fill a book, let’s focus on the areas of skill development, mental focus, awareness, and communication. Whether

applied to an individual producer or an organization, these are the four critical cornerstones needed to construct a solid foundation for success.

Skill Development

Think back to the last time you attended a sales seminar or training workshop. The attendees usually fall into one of three categories:

- The “new” producers who were eager to soak up everything that they could learn. They generally have some trepidation about starting a new career, show a hunger to learn, and have lots of questions for the instructor to answer.
- The “old” producers who really didn’t want to be there, because they already know the answers. They drift in and out of consciousness during the presentation and only seem alert when challenging the instructor in an attempt to show that they know more than the teacher.
- The “successful” producers. Regardless of their experience, these producers are excited to learn new skills and sharpen old ones. They listen attentively, respond appropriately, and are willing to share their strengths, weaknesses, and experiences for the benefit of the class and themselves.

Successful producers know the value of education, as well as the need for motivation. These are the people that schedule themselves for one sales training or reinforcement class every year, as well as at least one motivational presentation. They are also avid readers of business books in order to maintain a personal culture of improvement and a better understanding of their clients and prospects.

How much are you (or your agency) investing into skill development?

Mental Focus

Again, this is a huge topic, so let’s keep it simple and discuss our scheduling. Without my day, week, month, and year calendar in front of me, along with my daily to-do list that I write out at the end of each day, I would quickly lose my focus and concentration. These things keep me on task.

Consider the daily calendars of most sales people. The only items listed are usually appointments with clients or prospects, and anything that isn’t scheduled doesn’t get done. So what about scheduling time on your calendar for such things as prospecting, marketing, reviewing pertinent material, discussions with support staff, and even time for recreation and rejuvenation. These are the foundations of our success, yet we seldom actually schedule time to do them. The “catch as catch can” attitude leads to distraction and procrastination.

Finally, take some time in the morning to center yourself and focus on the upcoming day. Look at your schedule and your priority list, then visualize how the day will proceed. Every great athlete knows the power of visualizing successful outcomes. Yet most of us

fail to use such proven methods, which results in projection of fear rather than visualization of success.

Awareness

This is primarily the people factor in success. Are you maintaining an awareness of what's happening with your clients, your prospects, your co-workers, and your community? Do you reply quickly and appropriately to their concerns and issues? Do you take time to let a client know how much you value them? What about your co-workers? A "nice job" and a "thank you" go a long way in enhancing the relationship.

As for community, most of us are pretty good in this regard and our industry generally excels in giving back to the community – not just in financial donations, but more importantly the donation of our time and talents in order to help others. Remember, when we put others first, success is sure to follow.

Communication

We're going to boil another complicated topic down to two words: expectations and sensitivity. We live in a world of speed: When we want something, we want it now. Why should our clients and prospects expect anything less? Whether it is a phone call from a client, an e-mail from a prospect, or an inquiry from our website, speedy replies are essential. Successful people do not end their days until all correspondence has been processed.

The sensitivity factor concerns the concept of putting others before ourselves. For instance, we may prefer to communicate by e-mail because it is quick and easy. But if our clients/prospects prefer direct phone calls, it's our job to determine their preference and then learn to use their favored method, not ours.

Just the Beginning

As I've indicated throughout this article, the disciplines of success are varied. We've only touched on a few of the basics – but we have to start somewhere and the basics are still the best place for new beginnings. As you master them and make discipline a part of your life, advanced traits will continue to surface to further your journey into success.

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