

#SELF-LEARNING LEADER



www.gamaglobal.org

APRIL 2023
E-JOURNAL

MESSAGE FROM THE PRESIDENT

Continuous education doesn't just apply to employees; leaders must also adopt a learning attitude. Learning leadership helps a company to stay ahead of the curve when it comes to changing customer needs, regulations, and new technology that could alter the field completely.

Business, the world, and even our everyday lives are not static. The self-learning leader assumes the responsibility of knowing how to meet the needs of customers and employees. They understand the value that they provide and seek to enhance that value.

The self-learning leader views learning as an adventure. They seek numerous opportunities to continue learning and expanding their skills and knowledge, both in the industry and in relevant topics that might affect their work. Leaders had to learn new skills to adapt to the challenges of the COVID-19 pandemic. If they did not shift their attitudes, their businesses, customers, and employees would have suffered.

Every day will find new ways to test a leader's drive and innovation. At GAMA Global, we are committed to supporting our members in their pursuit of self-learning leadership. Our programs, events, and resources offer the tools and knowledge you need to succeed in today's dynamic environment.

Together, we can build strong, resilient companies that are prepared to meet the challenges of tomorrow. Thank you for your commitment to excellence and for being part of the GAMA Global community.



In leadership,

Bonnie Rodsman



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A small, dark, conical spotlight icon hanging from above, casting a soft glow.

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LEARNING TO BE A LEADER

Who do you know that is a leader? Think about them for a second. What makes you view them as a leader? Is it a personality trait, a habit, or a way of communicating? Whatever the case, have you ever found yourself asking, **“Were they just born this way?!”**

We’ve learned that leaders are made, not born. While a fraction of the population certainly seems to be predisposed to leadership roles, the rest have learned the necessary skills over time. This means that you and I, should it be our goal to lead people, can learn to get there. **But how?**



By Randy Little

On May 2nd, 2023, in Las Vegas at the **LAMP conference**, I will deliver a breakout session on “**Teaming and Succession Planning**.” During the session, you will hear about one leader and what this individual did to become one. Spoiler alert: it has a lot to do with learning.

Below are a few other points that can help us become leaders:



CHALLENGE YOUR STATUS QUO

Not everybody wants to be a leader. Many desire to find a leader that can guide them to the measure of success they seek in their career. When they find that someone, they will often express gratitude. Are you already seeing glimpses of this? Are colleagues turning to you for guidance and showing appreciation? If so, you risk resting on your laurels and not **challenging your status quo**.

Our career is everchanging, as is the landscape for our prospects and clients. Leaders must continue to grow. More than that, leaders need to have a vision and see what’s coming next. This ability only comes from being a student of the business and continually learning. So, while the skills you already demonstrate have got you here, ensure that you develop (and even change where necessary) to remain relevant to those you want to lead. This leads us to a specific area where you can make a difference.



TEAMING AND SUCCESSION PLANNING

We will discuss this together at **LAMP**. I would love to hear what you are doing to help advisors scale up and transition their practices. We are somewhere along the road to successfully accomplishing this vital task. Gone are the days of passive, one-person, planner, and advisor practices. We’re all being asked to do more with less; this will only be possible if we scale up and grow. When we started our efforts years ago, it was interesting to note how resistant some individuals in our office were. They needed a leader to coach them to success. However, how would we get there if we had never done it before?

The answer is learning. I’ve been attending LAMP for over a decade now, and I appreciate the people I’ve met during this time. The sessions themselves have been valuable, but, for me, it’s the discussions that happen in the hallways, over a sandwich or popping out to a dinner at the end of the day. What I learned from peers, how they explained their experience, and the passion I witnessed was invaluable! There is no way to get that kind of visceral experience any other way than together. We would pelt people with questions about teams and how they work with them. We heard all sorts of different approaches; some would work in our system, and some would not. What we did get was a path to run on. You will hear more about this at **LAMP**.



BE CONFIDENT!

As leaders in financial services, we often work with people with dynamic personalities. They are experiencing success, and it can seem that this will be the case with or without us. However, a wise industry leader once said that when you pull back the layers, many **successful advisors** are such... despite themselves!

Yes, they figure enough of the right things out that they go places, but they could go so many more, bigger places with some coaching! This is especially true when helping grow a team, which is where you and I can bring value. We can objectively listen to their needs and ask courageous questions about their real business growth ideas. We can challenge their thought process with the goal of **refining and broadening**. It does not require specialized, specific skills to be good at this. It requires some planning, scripting, and practice. The good news is that if you can get your best people to push forward, at least they will often take the reins and do the rest. After all, our best advisors are typically particularly good at hitting home runs when someone has lobbed them the ball. Getting them on the field is sometimes a challenge when it comes to a new idea. Just as we have all developed skills at taking clients through a discovery process that drives good outcomes, you can be confident that you can accomplish the same with your advisors.

In summary, we can learn to be **leaders together!** We can network and share great ideas. We can attend, and participate in, industry events. If we do, if we keep pushing, then we will build an environment in which our advisors can thrive. The faster we help them to scale up and add bench strength to their service offer, the better. All of this with the goal of providing solid advice to people in our community for many years to come.

LEADER-SHIFTER SPOTLIGHT



Phillip Ackers, CPA, MBA

FOUNDER
LAKESHORE PERFORMANCE LIMITED

FAVORITES



TRAVEL:

Key West, Florida



FOOD:

Mexican



BEVERAGE:

A nice glass of red



HOBBY:

Home Renovations



LEADERSHIP BOOK:

Good to Great, Jim Collins



INDUSTRY LEADER:

Nick Murray

BIRTHDAY

September 5th

SOCIAL MEDIA



www.linkedin.com/in/phillipackers



LEADERSHIP QUOTE:

“Simplicity drives change.”



INTENTIONAL LEADERSHIP

 *By Kareem Aboul-hosn*

At **LAMP** 2017, I spoke about **intentional leadership** in one of the breakout sessions. I realize our industry has had many twists and turns since then, but intentional leadership is still important. It is especially relevant to overcoming the adversity we see in the areas that drive our business. It is relevant from everything to recruiting, to driving activity with new producers, to helping our more seasoned advisors continue to grow their practice.

Leading with intent is not a characteristic that great leaders are born with or just happen to have, though I think many of us think this way. I know I used to. Instead, what I have learned from observing the **great leaders** I have been so fortunate to encounter and work with over the last couple of decades is leading with intent is a learned skill that involves a lot of practice.

The reality is that most of us get caught falling into a routine—almost like a whirlwind that takes over. Do you ever feel like the events of your day are played out by going through the motions? Or, like you are busy completing a task list all day, and at the day's end, you feel like you accomplished nothing meaningful? Having a routine isn't bad, but it is important to structure the routine purposefully. Leading with intent is about being deliberate and purposeful in almost everything you do.

However, there is good news: leading with intent is something we can all accomplish! Below are ways to get started and some areas in which implementing intention significantly impacted my ability to lead.

It starts with a simple step but is not always easy... **daily practice.** Take time every day to reflect. While this sounds a little cliché, it is important to take some time everyday to think about your choices and the decisions you made, including the small decisions. Reflecting and meditating on your actions and choices can help you learn a very important skill to better lead with intent. Making this part of your regular routine will help you build the skill and anticipate **opportunities** to use it. Think of this as having the ability to see around the corner before you get to it. Being able to predict the outcomes of your choices and decisions will force you to become much more intentional in making them.

Here are some examples of times when implementing intention made me a better leader:

PREDICTABILITY

A predictable leader is extremely important for leading a successful team. Intentionally working on being predictable can improve your leadership effectiveness in so many ways, including:

- ***Retaining the right people -***

I once heard, "Successful people flee unpredictable environments, and more importantly, unsuccessful people flee predictable environments." You are the leader of your organization and if you are asking yourself, "Can I create a more predictable environment just by being more predictable to my team?" **The answer is yes!**

- ***Create drive -***

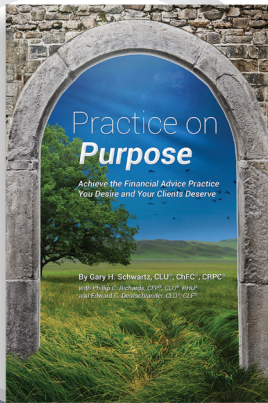
The more predictable you are as the leader of your organization or team the easier it is for you to create or give direction. More importantly, direction that yields productive movement. When your team is having to guess what you mean or not sure if you want them to; slow down, move faster, go left or go right they freeze out of fear of not getting it right. We all know how this behavior could stagnate productivity.

Imagine where you would be as a team (or even as producers) if you all remembered to do everything with a certain resolve in mind. It's easy to be determined when everything goes as planned, but the actual test of great leaders is what they do when their plans fall short. This is where true intentionality takes place.

For those of you that are attending LAMP 2023, I will be partnering up with one of the best recruiters in the industry to talk with you about **"Recruiting with Intention."** Don't miss it!! I hope to see you all at **LAMP 2023.**



LEADERSHIP BOOK CLUB



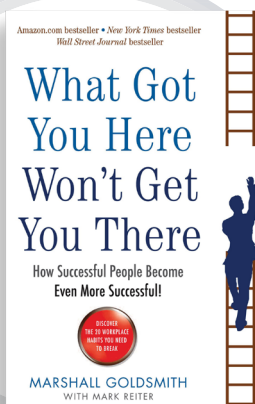
Practice on Purpose

Authors: Gary H. Schwartz, Phillip C. Richards, Edward G. Deuschlander



In Practice on Purpose, three senior executives in the largest independently owned financial services firm in the world reveal proven strategies for conquering performance plateaus. The authors describe practical steps advisors can take to build a Practice on Purpose—a practice built around the advisor’s personal purpose and in an intentional way, on purpose.

Show More: <https://www.goodreads.com/book/show/34902367-practice-on-purpose>



What Got You Here Won't Get You There

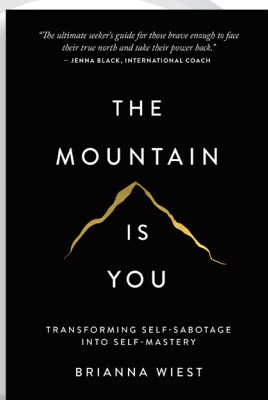
How successful people become even more successful

Author: Marshall Goldsmith



Your hard work is paying off. You are doing well in your field. But there is something standing between you and the next level of achievement. That something may just be one of your own annoying habits. Perhaps one small flaw - a behaviour you barely even recognise - is the only thing that’s keeping you from where you want to be.

Show More: <https://a.co/d/gY48br5>



The Mountain Is You

Transforming Self-Sabotage Into Self-Mastery

Author: Brianna Wiest



This is a book about self-sabotage. Why we do it, when we do it, and how to stop doing it—for good. Coexisting but conflicting needs create self-sabotaging behaviors. This is why we resist efforts to change, often until they feel completely futile.

Show More: <https://a.co/d/8D4Fs1x>

LEADER-SHIFTER SPOTLIGHT

Salvador Hernández Romo

AVANZA CONSULTORES



FAVORITES



TRAVEL:

Spain



FOOD:

Mexican food, chicken with mole



BEVERAGE:

Rum is my favorite



HOBBY:

I love TRAVELING and getting to know different places with my incredible family.



LEADERSHIP BOOK:

Secrets of the Millionaire Mind, T. Harv Eker...
it all starts from there.



INDUSTRY LEADER:

My father, Roberto Hernández Sánchez

BIRTHDAY

December 31st

SOCIAL MEDIA



@salvadorhernandezcoach



@salvadorhernandezcoach



@salvadorhernandezcoach



LEADERSHIP QUOTE:

“If the check doesn’t fit in your HEAD...
it doesn’t fit in your WALLET.”



THE SELF-LEARNING LEADER

 *By Hope Hernandez*

If there is one thing that I have learned in my time in the insurance profession as a person who has consistently found herself in leadership positions, it's that you must be both dedicated and passionate about learning. The leadership journey is so personal and unique, it is important to remember that no one is coming to push you toward who you are meant to be. You have to do it yourself and take personal responsibility for your learning and **leadership path**. In today's world of fast-paced technological advancements and innovative competitors, leaders must be able to adapt and be flexible. That means we must be able to learn, relearn and unlearn to be valued members of our teams.

What does it mean to be a self-learning leader? A self-learning leader is one that invests time and money into their professional growth. They know this investment will help improve their performance and the performance of those they lead. They have a positive growth mindset, are willing to fail, open to feedback, and are extremely resilient. They have the ability to embrace what they don't know and turn that into a continual thirst for knowledge. Rather than seeing what they don't know as a weakness, they see it as an opportunity. A self-learning leader is curious, humble, flexible, resilient, and innovative.

Make it your mission to be a **self-learning leader** in cultivating your leadership abilities and taking your business to the next level. By embracing this approach to leadership, we can be proud of the legacy we leave for future generations. The people we lead and serve deserve it.

SAVE THE DATE

LAMP 2024

March 17-20, 2024

Gaylord Rockies | Denver, CO

Visit www.gamaglobal.org/events/
to learn more about GAMA Global's upcoming events.

LEADER-SHIFTER SPOTLIGHT



Matthew Brymer, CFP, CPA, ChFC

EXECUTIVE VICE PRESIDENT
EQUITABLE ADVISORS

FAVORITES



TRAVEL:

Rocky Mountains - Breckenridge



FOOD:

Pizza...any type and it's not even close



BEVERAGE:

Pour over coffee



HOBBY:

Golf or snowboarding



LEADERSHIP BOOK:

Extreme Ownership, Jocko Willink and
Leif Babin



INDUSTRY LEADER:

Chris Noonan

BIRTHDAY

April 29th

SOCIAL MEDIA



<https://www.linkedin.com/in/matthew-brymer-cpa/>



LEADERSHIP QUOTE:

"Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others." - Jack Welch



LEARNING ACROSS GENERATIONS

 *By Matthew Brymer*

Over **100,000** new apps are reviewed every week before being added to the Apple Store. Some research indicates that the average working adult spends one-third of their waking time on their smartphone. Information flow is no longer confined to word-of-mouth, papers, or nightly news; we are constantly bombarded with new information and ideas. As if that isn't enough, add in the general workplace disruptors that COVID introduced and the process of navigating office environments with as many as five generations under one roof, all with different workplace preferences. The job of a leader has never been more challenging than it is today. With the world changing so rapidly, the only option to remain an effective leader is to constantly learn in a way that applies to all generations. As William S. Burroughs said, **“When you stop growing, you start dying.”**

Acknowledging that it's our duty as leaders to be lifelong learners and actually doing something about it are two completely different things. We can continue to learn by reading good books and attending conferences—these methodologies are time-tested. They are unlikely ever to go away, but I believe there are two critical questions that we should be asking ourselves:

1. **Are these learning methods transferrable to the next generation in the workforce?**
2. **What are some additional ways to learn?**

We will dissect both questions below to help us become the **most effective learners** possible.

Are books and conferences alone transferrable to the next generation? This question is critical because our learning is not just about us; it's also about our teams. As leaders, it's our job to create the next generation of leaders. To do so, we need to be able to connect with and develop those leaders with their communication style rather than ours. As a millennial, my generation typically prefers interactive and engaging learning with bite-sized content rather than long, elaborate lessons. Gen Z learns best in interactive and social settings that allow them to be “hands-on” and collaborate with their peers. This would suggest that books/conferences can be useful tools for each of these generations but far from the only ways for us to transfer knowledge to them and help them become learners.

What additional methods of learning might appeal more to the **next generations**? Again, as a millennial, my preferred form of content consumption would be short-form interviews and podcasts. Give me a five to fifteen-minute clip with a couple of actionable takeaways, and I'm as engaged as possible. If you have a favorite book and want to share it with a millennial, the ideal way to do it may be to find a podcast the author is on and send that instead! The bite-sized version of the content may spark enough interest that the millennial wants to download/buy the entire book and go deeper into the topic. For Gen Z, study and focus groups can be an incredible way to engage them and foster idea sharing and feedback (which provides an incredible form of learning for us as leaders). Consciously ask newer employees questions about what opportunities they see for the organization to grow and improve, and most importantly, listen to the answers. For Gen Z, **solving a problem** works best when you can put them into a group together and ask them to help be a part of the solution, which will help them learn from their peers and often come up with a creative new solution or path forward.

The final frontier of being a cross-generational learner and developer of leaders provides incredible scale by fostering a culture of learning and then teaching/sharing across the organization. The traditional leader would share knowledge with their team in either a one-on-one or classroom-style setting, but it would end there. To help learning to permeate the organization, the progression should be to empower those you share knowledge with to be the next teacher. We learn best by teaching, so have others share the same podcast/book/idea with others! When we create our training curriculum, we should fight to involve others whenever possible to help them learn the content even better and share their unique perspective with their peers.

To ensure that we as leaders continue to grow and evolve every day, we must employ multiple forms of learning. Books, conferences, podcasts, study groups, asking questions to listen, and empowering others to teach are all different forms of learning. Utilizing them will help ensure that we can transfer and apply our knowledge and learning style across all generations. That makes a great leader that can remain relevant and create staying power and longevity.



Are you a leader?

The Emerging Leader Program is a 12-month program to help new leaders learn the fundamental skills and knowledge to be successful and effective in their role.

Participants will learn about the following skills during the course:

- Define what leadership means for them.
- Focus on time proficiency management skills.
- Learn to develop agendas utilizing best practices.
- Receive certificate of completion and be recognized at LAMP Graduation Ceremony.

Reach out to your GAMA Chapter for information on how to enroll and get started!

LEADER-SHIFTER SPOTLIGHT



Nancy Fregil

BRANCH MANAGER
SUN LIFE OF CANADA PHILS. INC.

FAVORITES

 **TRAVEL:**
Sydney

 **FOOD:**
All

 **BEVERAGE:**
Coke


 **HOBBY:**
Eat

 **LEADERSHIP BOOK:**
John Maxwell


BIRTHDAY

September 10th

SOCIAL MEDIA

 www.linkedin.com/in/nancy-go-022089a1/

 www.facebook.com/nancengo

 [nancengo](https://www.instagram.com/nancengo)

“

LEADERSHIP QUOTE:

“Leadership is influence.”



SELF-LEADERSHIP: The Inside Job That Drives **True Leadership**

 *Farshad Asl*

Leadership is not just about commanding a team or an organization; it is also about leading and managing one's own life. The foundation of true leadership lies within self-leadership. **Self-leadership** is about intentionally influencing your thoughts, feelings, and behaviors to align with your purpose, values, and priorities.

Here are **seven key elements** that are essential to successful self-leadership:

- ***Knowing Your Values***

Every decision we make, both in our personal and professional lives, reflects our core set of values. Identifying and understanding these values is critical to making tough decisions. Take time to discover your core values and frame them in a mission statement. This will give you direction and help you make the right choices in life and business. Knowing and vocalizing your values will also attract individuals with similar values to your life and organization.

- ***Knowing Your Purpose***

It is important to start with the “why.” Having a clear purpose in life provides direction, saves time, energy, and money, and attracts the right people into your inner circle. A life driven by purpose inspires leaders to serve and add value to the world. Conversely, a life without purpose is like reading a map in the dark; despite having the best intentions, you’ll never reach your destination.

- ***Knowing Your Priorities***

Leadership is not about pleasing everyone and being everywhere at all times. The ability to say “no” to good opportunities in order to say “yes” to great ones is essential. Identify your priorities and invest your time and energy where it matters most. Ask yourself: Who do you spend most of your time with? Where are you going to invest your time and energy the most? What is your ultimate purpose in life?

- ***Knowing Your Strengths***

Identify your special and unique gifts. Focus on your areas of strength that will bring the most value to your life and business. Invest time in improving your degree of strength. As an aspiring servant leader, investing in your personal strengths can lead to becoming an expert in your field.

- ***Knowing Your Weaknesses***

Weaknesses can impede decision-making. Strengthen your abilities by investing in a good mentor or coach. This will allow you to continue investing in your strengths. Working with a mentor or coach will enable you to achieve higher levels of performance and return on investment.



- ***Knowing What You Love***

Love is the key to effective leadership. When we love what we do and produce, it elevates the beauty within our lives. It facilitates ease of servanthood to both the leader and the organization. Optimism, creativity, and endurance are the byproducts of serving with a sense of purpose rooted in love.

- ***Knowing Your Spiritual Needs***

Just as our bodies and minds require nourishment to operate at their fullest capacity, it is equally important to tend to our spiritual needs. Our mind is the power station generating electricity for our physical body. We must work daily to keep our physical body fit and our spiritual sense renewed and refreshed. Seeking guidance and blessings from a higher power can help transform you from surviving to thriving.

Self-leadership is the foundation of true leadership. By intentionally influencing your thoughts, feelings, and behaviors to align with your purpose, values, and priorities, you can create a synergistic alignment that will lead to personal and professional success. By investing in your strengths, working on your weaknesses, and loving what you do, you can become an effective leader that inspires and adds value to the world.

“We SPEND time, we PRIORITIZE tasks, and we MANAGE life.

The first person to lead is YOURSELF.

The first thing to manage is your LIFE.

The first area to focus on is your PURPOSE.”

LEADER-SHIFTER SPOTLIGHT



Mel John Aguilar

FWD LIFE INSURANCE

FAVORITES



TRAVEL:

Japan



FOOD:

Chicken Adobo



BEVERAGE:

Water



HOBBY:

Boxing



LEADERSHIP BOOK:

Infinite Game by Simon Sinek



INDUSTRY LEADER:

Russ Juson

BIRTHDAY

September 24th

SOCIAL MEDIA



@meljohnaguilar



<https://www.facebook.com/MelJohnAguilar92>



@mjaguilarofficial



LEADERSHIP QUOTE:

"If your actions inspire others to dream more, learn more, do more and become more, you are a leader."

- President John Quincy Adams

TED TALK LEADERSHIP SPOTLIGHT



Ryan Leak

Self Leadership

What has fear ultimately cost you, your team, your organization? In times of challenge and great uncertainty it's easy to feel paralyzed by fear, but what if you could..

WATCH NOW



Simon Sinek

Leadership

Learn in this Simon Sinek leadership TED Talk why leaders should make you feel safe. Simon Sinek achieves this through several great leadership examples and advice.

WATCH NOW



Constance Hockaday

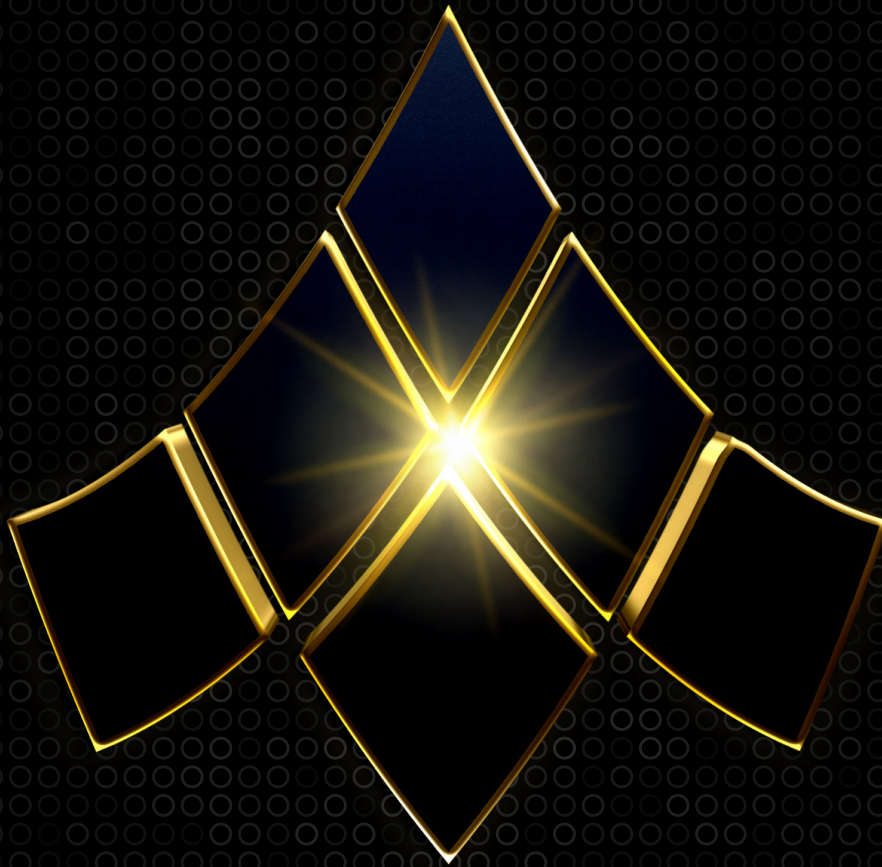
The one question every aspiring leader needs to ask

What does inclusive leadership look like? Artist and TED Fellow Constance Hockaday shares how the captain of a trans-Atlantic community raft...

WATCH NOW



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