

The Magic of Working Smarter



Discover the Road to Balance and Success

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The Warm-up to the Story

Tim Swift, an advisor with a prominent financial firm, was in his early forties. He was the type of guy you always enjoyed being around whether it was at the golf course, at the coffee shop, or at a neighbor's barbeque. He was the one who would ask questions and then actually listen to your answers, not because he was nosy but because he cared. He had a lot of buddies and a few close friends, but the pride and joy of his life was his family. He enjoyed and shared hours with his children who loved to play hockey, soccer, golf, and basketball and enjoyed the occasional snowboarding trip. He also had the good fortune of having two beautiful women in his life, his wife and young daughter. Life was good for the most part. Tim enjoyed helping people reach their financial goals and strengthen their financial lives, but he was at a crossroads and not sure what to do next. He wanted to find a way to share more quality time with his family while they were still young, take more vacations, and not be so consumed by his career.

He had a successful career compared to many of his peers, but he constantly wondered how he could run his business more efficiently. Tim's positive attitude and willingness to go the extra mile with his clients assured his success. His mission statement included the commitment to providing service and an attention to clients that was far superior to that which his competitors offered. In theory, it was an outstanding way to run a business. In practice, however, it took a tremendous amount of time. Now that Tim had hundreds of clients, maintaining that "extra-mile" level of service had become overwhelming. The hours of focus and effort were wearing him down, affecting his generally good attitude, and taking the enjoyment out of his business. This was like a marathon with no finish line. He desperately wanted to find some balance in his life so that he could have more leisure time.

Tim knew he had to make some drastic changes, so he called his good friend Marty. Tim and Marty had been close friends for ten years and gave each other advice whenever it was needed. Tim explained the things going on in his business, the number of hours required to maintain that extra-mile level of service, and some of his goals. One of his goals was to work just five days a week. He wanted to use the weekends to do something fun like play golf or share quality

time with his family, but right now, he couldn't without feeling guilty. It was impossible to take a day off because he had so many clients counting on him.

Marty understood Tim's dilemma and, as a good friend, listened patiently. He sensed that Tim was ready to discover a better way to manage his business and his life. Marty admired his friend's dedication to his clients and career but also knew from experience that it would not be long before Tim burned out. Tim's energy would decline and that would affect his attitude toward and passion for the business.

Marty personally knew this scenario all too well. He had been a top salesman in the financial planning business for many years while he used public seminars to build his business during the 1980s and 1990s. In the financial services industry, he was known as a "huge producer," which to the rest of us means a high-achieving salesperson. He rose to the top 1 percent of all salespeople at his firm very quickly, despite being so young and looking even younger. Numerous newspaper articles raved of his success and his achievement awards, and included photos of him on golf outings with celebrities.

One day, he decided it was time to rethink his life. Although he was paid well and had a beautiful European sports car and a second home at the beach, the work did not excite him anymore and money was not an issue in his life. When he analyzed which part of the business really excited him, he realized it was the client and prospect seminars that gave him great joy and energy. He looked forward to it more than anything else in his business. He was extremely competent and persuasive as a speaker. Anyone who watched him in action knew that speaking and persuasion were his strengths.

Eventually he sold his financial planning business in order to start a training business. Marty started training other advisors and sales reps who wanted to be more successful. He loved what he did and made more money than ever. The transition took a couple years but was well worth the challenges he faced initially. Marty compared life to a marathon. Some miles are easy, some are challenging, and others are downright ugly. But to complete the marathon, one has to persevere and keep the finish line in mind. It also helps to have a coach who has marathon experience.

Marty knew exactly what Tim needed and just the person who could help. He had a good friend who was a life coach and suggested Tim meet with her.

"She's a life coach? What's that?" asked Tim.

"Tim, do you know how your clients come to you with their financial concerns and goals?"

“Yes, Marty, I do.”

“Well, Kimberly acts as a career advisor to successful executives like you. She’s been coaching for ten years, has written four books, and has plenty in common with you. You are both runners, successful in your careers, have seemingly endless energy, and are very optimistic.”

Tim had heard about coaches for business from one of his buddies ten years ago but did not have a chance to get more information. He had just been too busy to look into it back then, but now he was ready to make the time. Marty gave him Kimberly’s number and promised to let her know that Tim would be calling. Marty sensed that this was a turning point in Tim’s life. It was a point many people faced in their careers, relationships, lifestyles, or fitness level, when they absolutely had to leave their comfort zones and make changes.

Tim had no doubt that he could continue his lifestyle, but for his own sake, he had to make changes soon. He also compared life to a marathon, not a sprint. He often mentioned in his investment seminars that mile by mile, if we have a plan, the desire, and the discipline to do what is necessary, we will continually get closer to our goals and eventually reach them. Tim was ready to start a new marathon, so that he could reach his goal of having more time off to enjoy life.

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