

The Team Manager As VISIONARY and SERVANT

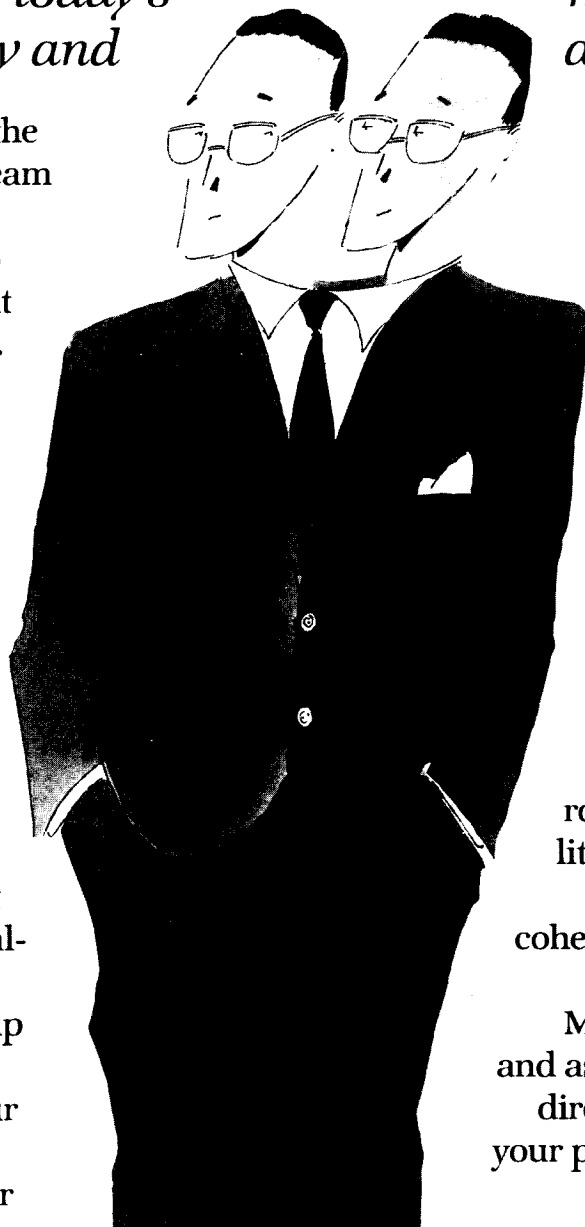
by LORRAINE P. HOLDEN

In sharp contrast to the view of the manager as hero and ruler, today's manager is both a visionary and a servant.

As a *visionary*, the manager keeps the team future-oriented. And because teams are so responsive, they want to be future-oriented.

As a *servant*, the manager, in a very real sense, *ministers* to associates. You don't find servants in ivory towers. They're in the trenches, along with the rest of the team, with their sleeves rolled up.

Experts say that 75 percent of the quality of the supervisor/employee relationship is the supervisor's responsibility, so your impact on how you relate to those in your



agency shouldn't be minimized.

Researchers at a major university discovered that the single most important factor determining employee burnout is the supervisor's management style. The employees who are at greatest risk are those in jobs where there is high pressure to produce but where there are no clear goals or roles. These people have little supervisory support and inadequate group cohesiveness and standards of performance.

Managing as a visionary and as a servant provides the direction and support that your people need to routinely perform well.

The Manager As Visionary

Every day, each of us chooses to either maintain the status quo or reach for greatness. For those who are content with the status quo, the route is marked by safety, caution, and dependency. The high road to greatness, however, requires stamina, autonomy, and more than a little courage.

Visionaries thrive on the high road, despite the risks, because they know it is the only path to excellence. In fact, the vision and goals that a leader brings to the agency have been called the "origins of excellence." They are the elements that exist inside an agency and contribute to its success.

Experts concur that unless you provide a vision—a picture—of the reason why you show up every morning, you are not providing leadership. You may be *managing*—filling out forms and carrying out procedures—but you are not *leading*.

A vision provides people with a concept of a new order and an idealized future. One of the chief reasons why people work is for a sense of meaning—the agency vision can help provide that for them.

Creating a vision is the essential act of leadership, according to one management consultant. Some examples of visions are:

- "We choose quality over speed."
- "We fulfill every promise, meet every requirement."
- "The purpose of a sales call is to help the customer make a good decision."

- "Our customers leave us feeling that they are understood."
- "Our customers are as important as our shareholders."

Vision breeds success just as surely as failure follows a lack of vision. One study showed that the top executives from poorly performing companies had little or no shared vision of what they were trying to do.

To arrive at your vision, you must ask, "Why are we here?" "What is our purpose?" "What is our preferred future?"

Your team must hammer out the answers.

quality management (PQM) sessions to evoke kaleidoscope thinking. During a PQM session, everyone contributes. Every idea is fair game. No idea, initially, may be challenged. This process allows surprises to happen.

One life insurance company president considers this ability one of eight key characteristics of effective leadership. Permitting challenges and involvement, he says, brings eventual support. When team members have a hand in hammering out a vision as well as goals and other decisions, they are more apt to buy in to

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Two secrets to creating a vision are, first, to kick practicality out the door, and second, to dream. A third secret is to be what an organizational scientist calls a "kaleidoscope thinker." When you use kaleidoscope thinking with your team, your assumptions are always open to question. You seek new ideas and want to arrange old ideas in new ways and new patterns. You *instigate* synergy among the people you supervise. As the leader, you accept challenges to the status quo. You want the mobile to quiver.

IBM uses process

the vision and goals and align with them. When goals are supported, they are more likely to be met.

Once your team's vision is established and "seen" by all, keep it before you. Your vision is a guiding principle that undergirds everything you do. It's the foundation for your team and it works, so show it off. Display it on stationary, on walls, on desks.

The vision for your group defines you and what you do and what you are about. It's good public relations to keep it in front of your customers. What's good for the customer is what's good for the team.

The Manager As Servant

A manager manages two agents who operate in another state. But to this manager, out-of-state doesn't mean out-of-mind. This manager regularly watches for sales ideas that might help him in business periodicals and in his discussions with other agents. When he finds something worthwhile, he jots the idea down or clips it and sends it along with a brief note. This manager keeps himself familiar with these agents' markets and takes time to ask if they need assistance with any special cases or if they face any special problems. The manager reports that

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agents consistently express their appreciation. "One of them explained "that although he had once worked in a district office, he never received the attention and consideration that he has received from me," he says.

This manager is a servant to his agents.

The concept of leader as servant has been with us since biblical times. It's not always a truth we heed but it is a truth nevertheless. True leaders are serving people. They respect those they supervise and they demonstrate that respect daily.

It has been said that

when a boss is not approachable, it's as though he or she is managing with one hand behind the back.

Servants wield personal power. It is a power derived from skills (especially people skills) and knowledge. As one manager tells his staff, "I will never ask you to do anything that I can't do, haven't done before, or couldn't do again if necessary."

A wise industry observer advised, "Always treat your own agents as you would want them treating your very best client." One way to do this is to actually invert the traditional management pyramid to demonstrate that your primary function is to support those who, in turn, support the customer. Once your organizational pyramid is inverted, be a consultant *by invitation only*.

To become a servant to your associates, ask yourself, "What is my disposition to my team?" "What's my human philosophy?" "What are my feelings about my job and its importance?" "Am I able to listen long enough and well enough to my team members?" "To what extent am I able to satisfy their needs?" "Would I want my children to work in this agency?"

And finally: "Would I want to be managed by me?"

Being a servant means you admit that you need others far more than they need you.

Lewis C. Yount has said he has four ingredients for good agent/manager relations. His first ingredient is trust. He rec-

ommended that in all relationships you should strive to set an example of honesty and integrity that your associates will want to emulate.

When a manager is open, trustworthy, and works with the attitude of a servant, team members do the same.

If you want people to take their responsibilities to you seriously, to their colleagues, and to their work, your role as servant is to give them the latitude to learn to trust their perceptions, judgments, and instincts.

One agency vice president calls this activity "monument building." He says the main characteristic of eminent managers is their ability to attract people and make those people successful.

A manager says, "Superior managers regard concern about helping others as an essential part of their job. They perform the role of coach, counselor, and helper. Such managers consider themselves as integral members of a team. Passing on the lessons of experience is a prelude to inspiring success by openly showing faith in others."

A case that illustrates the effectiveness of the leader as servant and monument builder involves a manager who assumed leadership of a district from a deceased manager. The former manager was well liked and respected but he ruled with an iron fist. The new manager chose a different tactic, realizing that change should occur gradually. To begin, he went out in the field with the agents to see how they operated. He

observed and listened so that, over time, a rapport eventually developed between him and the agents. The agents realized that he was truly interested in their welfare and in their achievements. He proved his willingness to help. The manager was ultimately able to gain the agents' respect beyond even his own expectations when the agents saw that his assistance led to improved productivity. The root of this manager's success in a new agency was the success he made of his people. He built monuments and used personal power to accomplish his ends.

Listening hardly seems like a strong tool with which to build trust. Then again, service to others isn't your ordinary leadership model. It's extraordinary. It works.

Not surprisingly, what works for your agents also works for your administrative staff. A leading consultant advises and challenges you to:

- Think of your administration staff as members of your team.
- Involve them in decisions affecting their roles.
- Motivate them to have the same commitment and dedication to your success as you do in theirs.
- Encourage them to grow in their business and personal lives.
- Inspire them to be the very best they can be.
- Reward them only when they exhibit the above qualities plus increased productivity. ■

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DREAMING ON

It takes vision to manage a team of 90 agents and 200 brokers, and that means being willing to dream.

The Morgan Financial Group is an insurance investment firm in Baltimore, affiliated with Lincoln National Life. Heading the agency as its president and chief executive officer is James G. Morgan, CLU, RHU, who has helped lead the agency to a ranking among the company's top four agencies every year since 1969. He has qualified for the company's President's Trophy 10 times in the past 12 years.

James G. Morgan, dreamer, isn't selling pots and pans anymore. That's because when he was 20 he dared to dream big and took a gamble on a career selling life insurance. Today you could probably say that his dreams have come true.

Morgan shared his dreams and some practical experience at the 1988 LAMP in San Diego, sponsored by GAMC.

He learned his first lesson about dreams when he was hired into the business by his Aetna Life & Casualty district manager. "One of the great things he did for me was he told me his goals," Morgan said. "He told me, 'I want to be a general agent. I'm a district manager now, and you can help me get there.' The thing was, he was willing to share with me his dreams, and I wanted to help him realize them. That was important to

me." The district manager eventually did become general agent and, later, president of an Aetna subsidiary.

After several happy and productive years with Aetna, Morgan decided for personal reasons to make a switch in 1969 and opted for Lincoln National Life. He remembered his interview with the company's field vice president, who asked him, "How much money do you want?" Morgan told him how much and the man said, "Fine." Morgan said he'd never forget that because he probably could have asked for more.

Perhaps it taught him another lesson about dreaming big.

One stumbling block Morgan has faced his entire career is the fact that he is, in his words, "extremely dyslexic." With regard to his career, the handicap has meant added hardship in taking exams—it took him 20 years of determined effort to finally earn his CLU designation. But he has overcome his dyslexia, in part, because he isn't afraid to dream.

"I kept going (after my CLU)," he said. "Why? Because I saw myself being a CLU. And I knew that the minute I gave up then I'd never become a CLU."

As the assistant general agent (to Irving Abramowitz), Morgan's job was to select, train,

and supervise agents. He started in 1969 with 25 agents, which he increased steadily to 46 agents in 1975, the year he became agency head. By 1982 the agency had grown to 70 agents, and by 1987 it had 90 agents, and its new wrinkle—a brokerage operation—was in full operation with 200 brokers.

Morgan said he promotes entrepreneurship because he believes that agents have to work for themselves. It's a policy that works well, although, he admits, it sometimes backfires. On occasion, he said, agents become so independent that they don't need him anymore. "That happens. I've paid the price. But I'm not changing that philosophy. It has worked well for me," he said. He elaborated, "Brand new agents don't pay anything but their telephone bill and some incidentals for the first two years. After that, they pay all expenses, and we've been doing that for many, many years. We 'revenue share' with them—we pay them anywhere for 5 to 20 extra points depending on the volume of business they write."

Forty of the organization's agents are housed in its main building, and 14 management people and 36 support people back them up, according to Morgan. "We believe in getting secretaries for every-



One
Manager's
Story