



Case Study

Outline...

Description: Wade Associates provide a full range of Independent Financial Advice to both corporate and private clients.

Year Company Established: 1983

Main Issue:

Increased regulations and decreasing commissions in the financial industry.

Result:

The effects on Ian's business life and team were dramatic. The quality of the clients generated by Ian and his team improved beyond recognition. Simply put Ian now works less and earns more than he has ever done before.

Background...

When Ian Little started Wade Associates with two partners back in 1983 the financial services industry was a very profitable industry to be in.

Although things were good for Ian and his partners and they had a reasonably successful business, things were beginning to change in the world of financial services. These changes included increased regulation (which meant more overhead costs in terms of administration) and decreasing commissions from the large insurance providers.

Ian knew that the business needed a shot in the arm and it wasn't going to come from standard industry training.

So Ian asked a few companies who specialised in personal development to come and speak to him and his staff. Although some of the events were inspirational they didn't give Ian and his partners a programme he and his people could plug into.

“We had some people do a motivational event which was good but I chose to work with Lifestyle Architecture™ because of the 1:1 programme that it allowed us to plug into.”



That's when a rep from one of the big insurance providers mentioned to Ian that he knew of a guy called Tony Wilson who had a programme called Future Performance™. The associate explained that Future Performance™ wasn't just a one hit wonder and would provide a series of live events and 1:1 meetings over a period of 6 months.

Ian contacted Lifestyle Architecture™ and asked Tony to present to him and his staff.

Tony obliged and after presenting to Ian and his partners they agreed to work with Lifestyle Architecture™ to give the business the boost it needed.

What Happened Next...

Upon agreeing to work with Lifestyle Architecture™ a Future Performance™ partner worked with Ian and 7 other people in the business which included the senior partners and the key management team.

One of the immediate benefits of the Future Performance™ programme that Ian and his partners were looking for was the accountability factor that a planned series of group sessions would bring. Basically before each session everyone in the team had to have worked on a specific item that was relevant to them. Obviously not doing so was not really an option so this really spurred people on to make the necessary changes that the programme highlighted.

When anyone embarks on a Future Performance™ programme, one of the early focuses is on the roles a person plays in their life and what they are giving to each of those roles.

In Ian's case it became glaringly obvious that certain roles were being neglected.

“Being made aware of the roles I was playing in my life and how I was or wasn't serving them was a real breakthrough for me.”

Ian's average day was late hours with Ian always talking to his wife about when he was going to get home. And when he was at home on the weekend he was trying to catch up on work so he'd end up going into the office on a Saturday.

One of the emotions Ian remembers experiencing when he went into the office outside of working hours was one of “letting the side down” at home.



After spending time with his Future Performance™ partner, Ian was forced to solve the problem of serving his roles of father and husband and he knew this had to come from a change in the way he was running his business life.

This made Ian and his partners look at the admin overhead that would build up after getting the new business from his clients. At the time Ian and each partner had to personally handle this on their own.

Although Ian in the past had done this because of the upfront cost saving he began to see how he would be able to do more and still see his family more if he brought in more admin support.

From being forced to look at his roles as a whole, the partnership made a significant change to the way they were running their business and in turn, their lives.

The result of all of this was that the right resource was put in place instead of Ian doing it all himself.

“Future Performance™ helped me overcome the ‘fear’ of saying no to people.”

One of the other roles that Ian was not serving as best he could was that of ‘Business Owner’. When Ian first engaged with Lifestyle Architecture™, Ian was saying yes to everybody due to his inherently caring nature. Although this was a nice way to be it was massively undervaluing Ian’s time. And in turn it wasn’t helping grow the business that served not only his family but Ian’s partners and staff.

After a few months of the programme being underway Ian began to realise that by having a fear of saying no to people, he was clogging his time up with unproductive meetings and tasks. This was creating a blockage between where Ian was and Ian’s true potential.

Ian worked on this ‘fear’ and his Future Performance™ partner showed him how using a unique bridging process he could not only overcome it but eliminate it for good.

“I now earn more than I’ve ever done before but I would say that I work less than I’ve ever done before as well!”



By putting more value on his time Ian started to achieve more of his personal and business goals as well as have the ability to serve the clients that needed his expertise the most.

This resulted in Ian managing his diary around his goals and his roles rather than just making appointments. This in turn meant that Ian was able to have more time and more money than he had ever had before.

Key Highlights...

- Overcame the fear of saying 'no' to clients
- Put a whole new value on time
- A business and personal development programme based on serving key roles
- Key staff and partners all benefited from looking in the mirror
- More time spent with the family without sacrificing income

Comments...

Ian and his key team worked with their Future Performance™ partner for just over a year in the end. As of writing Ian is embarking on a new series of 1:1's which are based around the latest release of the Future Performance™ programme.

“I found the whole thing uplifting! It’s allowed me to improve my quality of life by spending more time with people that matter most.”

The effects on Ian’s personal and business life were dramatic. It wasn’t long before Ian started to feel that ‘he wasn’t letting the side down anymore’. Also the quality of the client of Ian’s team improved beyond recognition. Simply put Ian now works less and earns more than he has ever done before. Ian puts most of this down to engaging with Lifestyle Architecture™, using Future Performance™ and having the chance to work with a mentor.