



SOCIETY OF ACTUARIES

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Identify Your Success Obstacles

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Editors Note: The Influential Actuary is a new book written by David C. Miller that lays out specific tools and strategies that enable actuaries and other technical professionals to raise their game and add greater value to their organizations by being more influential in the way they communicate, influence and relate to others. This article is an excerpt published with permission of ACTEX Publications. To find out more about this book, got to www.TheInfluentialActuary.com.

FIVE SUCCESS TARGET AREAS

In the last issue of *The Stepping Stone*, I discussed five critical areas that you must be clear about and must master if you want to reach just about any goal (see *Five to Thrive*):

- Clarify your GOALS to provide **direction**,
- Create and implement a STRATEGY to provide the **vehicle** to accomplish those goals,
- Upgrade your SKILLS to provide the **effectiveness**,
- Optimize your ENVIRONMENT to provide **leverage** and
- Master your PSYCHOLOGY to provide the **passion, persistence and determination**.

To be successful you need to design a comprehensive plan that includes these five elements. Set your goals. Design and implement your strategy to achieve these goals. Along the way upgrade any skills necessary to be more effective in your execution. Take specific actions to optimize your environment. Finally, make sure you keep your psychology in a resourceful state to keep on track every day.

As a general principle, you want to keep these five target areas in mind as you examine your progress to your goal.

Evaluate “On a scale of 1 to 10...”:

- How clear and specific are your GOALS? Do you have something specific you are shooting for and moving toward?
- How well are you pursuing an effective STRATEGY? Do you have a defined plan of action that will get you to the correct destination?

What is your level of knowledge and SKILL in executing your strategy?

How well does your ENVIRONMENT support you? What is the strength or resourcefulness of your PSYCHOLOGY? Is your mindset one that will propel you forward or hold you back?

Just by keeping an eye out for these five target areas, you will uncover a wealth of rich areas that will greatly help you stay on track to meet your goals.

IDENTIFYING SUCCESS OBSTACLES

These success target areas are also helpful to identify where we may be getting stuck and thus what to focus on to get our momentum back. The question is: “How do I know that when I get stuck, the problem is going to require a renewed focus on GOALS, STRATEGY, SKILLS, ENVIRONMENT or PSYCHOLOGY?”

To ascertain this we need to ask ourselves three determining questions:

- Do I know what to do?
- Am I taking action?
- Am I motivated to take action?

These three questions expose a decision tree of outcomes (The appendix outlines the logic flow):

I DON'T KNOW WHAT TO DO

We begin with the presenting problem: You are not getting the desired result. Begin this process by mentally asking the first question, “Do I know what to do?” “Do I have a plan of action that I am pursuing, or am I totally lost and floundering?”

If the answer is no, then you may want to focus on STRATEGY. If you do not know what to do, you need a game plan on how to proceed. Explore options, brainstorm with a coach or accountability partner, seek counsel and do whatever it takes to develop your strategy.

I KNOW WHAT TO DO / I AM TAKING ACTION

Now suppose you have a game plan you've been pursuing. The next question you want to mentally ask is "*Am I taking action?*" Suppose you are taking action. You are pursuing a course of action and are frustrated because you are not getting the results you want.

It could be due to one of three things:

A **SKILL** problem. You may be taking action, but you may not be effective. You need skills training to improve your proficiency. Training can take many forms such as books, tapes, seminars, classes and coaching. You will build proficiency with the skills if you engage in practicing these skills.

On the other hand, their problem may not be **SKILLS**....

You may be pursuing an ineffective **STRATEGY**. For example, if you are a consultant, you may have an excellent marketing message and selling approach, but you're executing those skills at a trade show that does not draw from your target market (i.e. You are fishing in the wrong pond).

The definition of an ineffective strategy is "one that won't get you to your goal no matter how effectively you execute it". This is in contrast to a skill problem which involves "not effectively executing an effective strategy". You want to make sure that the strategy being pursued is an effective one.

But it is possible in this scenario, the primary culprit is not **SKILLS** or **STRATEGY**...

It may be an issue with your **PSYCHOLOGY**. You may have an effective strategy and solid skills but you are lacking the confidence to execute effectively. You may, for example, have written an excellent oral presentation for the Board, but deliver it without any passion or presence. Alternatively, you may leave out a key part because you are afraid of rejection.

So in this situation, where:

You are not achieving their desired result,

You know what to do, and

You are taking action...

You will want to focus on **SKILLS**, **STRATEGY** or **PSYCHOLOGY**. Is it possible that it could be more than one of these? Absolutely! There is interaction and overlap between all of these categories. You are dynamic and one area will affect another. Decide which has the highest priority and work on that.

I KNOW WHAT TO DO / NOT TAKING ACTION / NOT MOTIVATED

Now let's look at another scenario. Suppose you know what to do and you are **NOT** taking action. The next question you want to mentally ask yourself is "*Am I motivated to take action?*" In other words, is there a desire to take action or not?

If the answer is "No", then you want to focus on one or both of these two coaching target areas:

You may have an unresourceful **PSYCHOLOGY**. There is something about the task that is unpleasant. You may be thinking, "It feels uncomfortable to put myself out there and ask to lead that project. Too self-promoting." People will not take action in an area that violates their morals, ethics or their sense of who they are.

If this is the case, take some time to understand your values and perspective. Adjust the beliefs that are not serving you to get yourself back in the game.

I often work with clients who feel that to succeed in sales, they have to be someone they are not. They feel they need to be slick and extroverted and even manipulative and pushy. As a result, they resist taking effective action.

The key is to reframe their perspective about selling. I believe selling is about sharing something that can help change your prospect's life. I first help my

CONTINUED ON **PAGE 28**

clients to see the value of what they are offering, then I work with them to sell in a way that fits their natural style.

The other target area to explore if you are not motivated is **GOALS**. It is possible you have lost focus of the goals you are pursuing or the reasons you have for achieving them. Alternatively, you may no longer want to attain a particular goal.

Go back and revisit your goals. See if they still inspire you. If not, do some new goal-setting and vision work. If you are working toward a goal that inspires you, your motivation will return.

I KNOW WHAT TO DO / NOT TAKING ACTION / MOTIVATED

Let's examine another set of paths. Suppose you know what to do, are not following through on your plan, yet you are motivated—you really want to take action.

Yes, it is not uncommon for people to be motivated, yet not take action.

There are three possibilities to explore here:

You really want to take action in the areas that will help you become more influential, but you keep getting sidetracked.

You really want to take action, but you don't know how to do it.

You really want to take action, but you are not sure why you don't.

Let's go through these one by one.

I KNOW WHAT TO DO / NO ACTION / MOTIVATED / SIDETRACKED

The first possibility is that you keep getting sidetracked from actually doing what needs to be done to succeed. There are three possible target areas here:

Your **ENVIRONMENT**. You may have trouble

keeping organized. You may struggle to manage your time, priorities or relationships. You may not have support from your boss. You are being assigned so many technical tasks, that you have no time to focus on the interpersonal side of your professional development.

Work to optimize your environment. For example, you might start using a time management system. Maybe you need to look for ways to leverage work. Delegate certain duties to staff so that you will have uninterrupted time to focus on your professional development. Stop saying "yes" to every request and draw some boundaries.

There are many ways to create a supportive environment. Brainstorm these ideas and make adjustments.

What are the other areas that may explain you getting sidetracked?

You are unclear about your **GOALS**. Is achieving excellence a high enough priority for you? Do you want the results badly enough to do what it takes? You may need to reevaluate and recommit to your goals.

PSYCHOLOGY. People have trouble saying "no" to others because of what they think and believe about how people will respond to them. They have trouble saying "no" because of what that means to them. "If I don't say 'yes' to everything, I'm being selfish or I'm not a team player," for example.

You may not be managing your time and priorities well, not because you do not have the systems or skills, but because there is something negative in your mindset about pursuing these professional goals.

I KNOW WHAT TO DO / NO ACTION / MOTIVATED / DON'T KNOW HOW

Now we will explore another path:

You know what to do,

You are not taking action,

You want to take action, but
 You don't know how to do it.
 You know *what* to do but not *how* to do it. This is a SKILL issue. You want to take action, but you need some modeling and practice on how to do it. You need mentoring, training and skill-building. If you grow in competence and still are not taking action, then it's time to examine another target area.

I KNOW WHAT TO DO / NO ACTION / MOTIVATED / NOT SURE WHY

There's one more situation we want to look at:

You know what to do,
 You are not taking action,
 You want to take action, and
 You don't know what's holding you back.

Here the issue is again, most likely our friend ...
 PSYCHOLOGY.

There will be situations where you will not be able to verbalize why you are not taking action in an area you want to. It could be any of the categories but it is safe to start with psychology. In this scenario, your lack of results is most likely due to what you are thinking or believing about the task. It is not unusual to be unaware that these beliefs are operating. Developing awareness of how your thoughts and beliefs affect your performance is critical. Then do the work to change what you think to support what you want to accomplish.

When you get stuck, work through the three determining questions to identify the obstacles to your success.

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APPENDIX: IDENTIFYING SUCCESS OBSTACLES

Problem: Not achieving a desired result

Do you know what to do?

If no, then focus on Strategy (brainstorm options to develop a game plan)
 If yes, go to 2

Are you taking action (or implementing your chosen strategy)?

If yes, then focus on one or more of the following areas:

Skills – you may be taking action, but may not be effective. You need skills training.

Strategy – you may be pursuing an ineffective strategy.

Psychology – you may have a good strategy and good skills but are lacking the confidence to execute effectively.

If no, go to 3

Are you really motivated to take action? (Do you want to implement the strategy?)

If no, then focus on one or more of the following categories:

Psychology – there's something about the task that is unpleasant. Like "I hate promoting myself. I feel sleazy doing it."

Goals – it is possible you have lost focus of the goals you are pursuing or the reasons why you wanted to achieve those goals in the first place. Or you no longer want this goal.

If yes, go to 4

You are motivated to take action...

And are getting sidetracked, explore the following:

Environment – you may have trouble keeping organized, managing your time, priorities or relationships.

Goals – You may be getting sidetracked because you are unclear about your goals.

Psychology – People have trouble saying "no" to others because of what they think and believe about how people will respond or what that means.

OR

But don't know how to do it...

Skills – you may need some more knowledge or skills. You want to take action, but they need some modeling and practice on how to do it.

OR

But something is getting in the way...

Psychology – there will be situations where you will not be able to verbalize specifically why you are not taking action. It could be any of the categories but it is safe to start with Psychology.