

Leadership & Managerial Excellence Interest Group

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Message from the Chair — Six Sigma

by Michael J. Jagadich, CPCU, FMA, AIM, AIC, ASC



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In our July 2009 newsletter, I wrote about my participation in the Six Sigma Green Belt certification program and detailed the use of one of the Six Sigma quality improvement tools — the waste walk.

In this issue’s column, I will expand on the Six Sigma program overall and answer the following questions:

- What is Six Sigma?
- What is the history of Six Sigma?
- What are the certification levels and how can you obtain training?

What Is Six Sigma?

At its most basic level, Six Sigma equates to 3.4 defects per million opportunities. At its most sophisticated level, Six Sigma is an organizational philosophy.

Six Sigma utilizes the DMAIC model for process improvement, which is an acronym for five interconnected phases:

- D — Define opportunity
- M — Measure performance
- A — Analyze opportunity
- I — Improve performance
- C — Control performance and optionally ...
- T — Transfer and share best practices

What Is the History of Six Sigma?

The 1800s

The use of Six Sigma as a measurement standard can be traced to **Carl Frederick**

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Message from the Chair — Six Sigma

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Gauss (1777–1855), who introduced the concept of the normal curve.

The 1920s

Six Sigma as a measurement standard in product variation can be traced to the time when **Walter Shewhart** showed that three sigma from the mean is the point where a process requires correction.

Since then, “sigma” has been used in mathematics and engineering as a symbol for a unit of measurement in product quality variation.

The 1980s

In the mid-1980s, engineers at Motorola Inc. USA used Six Sigma as a name for its in-house initiative for reducing defects in production processes. After great success in the late-'80s, Motorola applied Six Sigma methods to its critical business processes.

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The 1990s

In the early-1990s, Motorola certified its first “Black Belt” Six Sigma experts, which was the beginning of the formalized accredited training process for Six Sigma.

At the same time, Allied Signal adopted Six Sigma methods and claimed significant improvements and cost savings.

In the mid-'90s, General Electric's CEO, **Jack Welch**, implemented Six Sigma, and by the late-'90s, Six Sigma had generated over a three-quarter billion dollar cost savings.

By the end of the '90s, Six Sigma had developed into a transferable, branded corporate management initiative and methodology.

The 2000s

By the beginning of the decade, Six Sigma was effectively established as an industry in its own right, with thousands of companies around the world adopting Six Sigma as their way of doing business.

Since then, Six Sigma has evolved into more than just a quality system like Total Quality Management (TQM) or International Organization for Standardization (ISO). It has become a way of doing business.

What Are the Certification Levels and How Can You Obtain Training?

There are several educational institutions and organizations that provide certified training courses via various methods. Courses are available for obtaining a Green Belt (basic understanding), Black Belt (advanced) and Master Black Belt (highly advanced) certifications. Each of these levels provides deeper learning into Six Sigma concepts and applications methodologies. ■

Conducting Effective Customer Surveys

by Laura M. Kelly, CPCU, AIC, AIS, ASQ, CQIA



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A survey is an excellent tool for collecting direct feedback from your customers and improving your performance. When conducted properly, the wisdom gathered can assist you in successfully addressing customers' concerns, answering their questions and meeting their expectations. A survey may even help you to identify a new service or product and enhance the relationship with your existing customers. This article will review several key factors to consider throughout the process — from developing the survey and analyzing the data to the importance of reacting to the knowledge you have gained.

Where to Begin

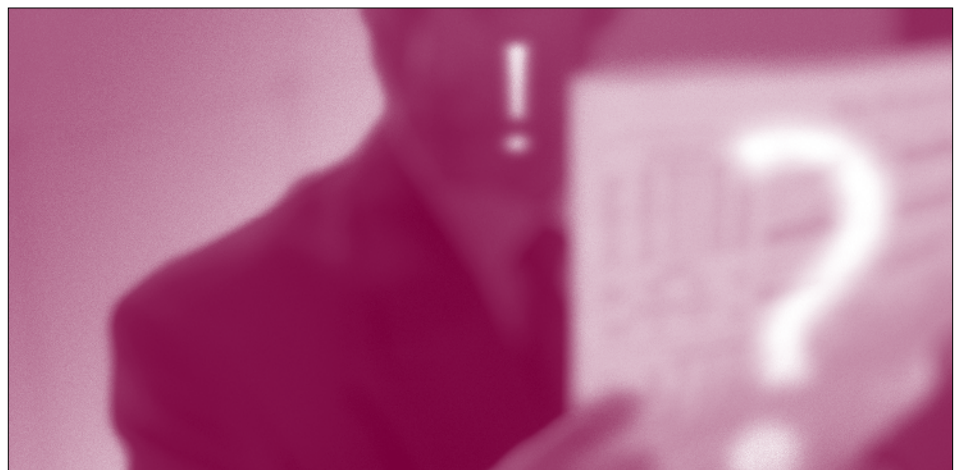
The first step in developing an effective survey is to consider what knowledge would be the most valuable to have from your customers and what you will do with that information. You should consider whether a survey is in fact the best feedback mechanism to secure this data. Keep in mind that there are many alternatives to a survey that may allow you to extract more detailed feedback, for example, focus groups, phone interviews or even in-person interviews. If a survey is the appropriate means of securing feedback, then in a group setting brainstorm to consider what type of data you hope to receive and create a list of all ideas.

After the brainstorming session, prioritize the ideas based on what you need to know about your customers versus what you are just curious to know about them. Once you have determined which information is the most valuable, tailor the questions to help you elicit those details. If you have surveyed your customers previously, review past surveys to ensure that you are not asking the same questions repeatedly. You may even want to expand on the last survey's questions to develop even more helpful data with this survey. Before you introduce the survey to your customer base, test it on a small sample group first. This will help to reveal unanticipated problems, such as confusing instructions or questions, and allow you the opportunity to correct them.

Encourage Participation

This step in the process is significant because having a greater number of participants will provide you with more meaningful data. Respect your customers' time, and make it as easy as possible for them to participate and return their responses to you. Most customers will appreciate a brief explanation about why the survey is being conducted and what you intend to do with the results. In addition, always provide simple instructions, estimate how long it will take

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Conducting Effective Customer Surveys

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to complete the survey and explain the benefit that the customer may derive. It is also helpful to identify a contact person for survey participants to phone or e-mail with questions or for assistance, if needed.

If you offer the option for the customer to remain anonymous, you may find an increase in participation as well as more forthcoming and honest feedback. A token thank you gift or prize drawing can be an additional incentive to complete the survey. Keep in mind that e-mail and Web-based surveys are convenient and fast for both you and the customer. There are many Internet survey services available today that facilitate the process of distribution, response collection and data organization.

Interpret Survey Data

Once the survey has been completed and the responses have been collected, it is time to organize and analyze the data. The first step in organizing the data is to determine what percentage of your customer base responded to the survey and then assemble the information that has been collected into a format that allows simple comparison. You will likely use different tools to compare and contrast the responses based on each question's format. For example, a bar graph will help to compare quantitative or numeric responses, but a scorecard will be more appropriate for feedback that requires a scale-rating response.

If you asked open-ended questions, be sure to read and list each individual comment made in response to each question. Always pay close attention to these remarks, as participants usually take the time to provide detailed thoughts if they have a strong feeling or opinion. It is imperative that you determine if there is a common theme reflected in the multiple responses to identify positive and negative trends and to ultimately help you decide what action you will take.

Develop an Action Plan

Once you have cataloged the responses, it is time to prioritize and identify which ones need your immediate attention. How you react to the feedback provided is crucial. At this point in the process, you should be prepared to investigate concerns, consider customers' suggestions and respond to inquiries. If you do not have the time and resources to be responsive in this manner, then postpone the survey until you do.

As you investigate concerns or complaints, you may identify issues with your product or service that will require you to make changes. It is imperative that you determine the root cause of any problems identified so that you can properly evaluate how to best resolve them. Successfully addressing problems can be a wonderful opportunity to redeem yourself in the customers' eyes and ultimately earn your customers' loyalty. If it will take some time for you to identify the root cause of a problem and determine the best solution, let your customers know that you are aware of their concerns and that you plan to respond. If your customers made inquiries during the survey process, it is important to make sure you respond to each inquiry in a timely manner.

Through your customers' suggestions, you may discover a new unfulfilled need — and possibly a market — for a new product or service that you can provide as a result. You may even develop a deeper understanding of your customers by learning what they value the most. This may lead to modifications of your existing product or service that ultimately provides a higher level of satisfaction to your customers.

Along with concerns, questions and suggestions, you will undoubtedly find areas where your customers have highly rated your product or service and have reinforced that you are on the right track.

Share the Results

A survey can send a strong message to your customers that you care enough about their needs and opinions to ask. Sharing the results and your plan of action can send an even more powerful message — that you respect and value your customers and have heard their message. All too often customers participate in a survey but do not learn the results and have no idea what, if anything, the surveyor has done with the feedback.

Many customers will be interested in learning the survey results from you. You may share results in a number of ways, including in a newsletter, on your Web site or even by the same method that you distributed the survey. Following through on a plan of action that includes informing your customers of your intentions can be an excellent opportunity to distinguish yourself and show your customers that you truly care about meeting their needs and making sure they are satisfied.

Conclusion

Keep an open mind throughout the entire process. Although negative feedback may be difficult to receive, it should always be viewed as constructive criticism. Use the feedback as a chance to improve and build stronger relationships. Customers always have an opinion about the services and products they utilize, whether or not you choose to ask for it. By conducting a survey, you will proactively seek out their feedback and learn how your customers feel about your product or service. Knowing what your customers need and want, and how they feel about your product or service, will be key to your success! ■

What Really Works When It Comes to Coaching

by Mary Key, Ph.D.

Mary Key, Ph.D., business consultant, speaker, author and executive coach, is an executive in residence for the Institute for Corporate Productivity (i4cp) and founder of Key Associates Inc. (www.keyassociatesinc.com), an organizational effectiveness consulting firm committed to the development of leaders and organizations. She specializes in leadership development and coaching, and works with organizations across North America. Key also served in leadership roles at several major international consulting firms, working with Fortune 500 companies. She earned her Ph.D. from the University of Virginia. For more information, contact her at mary@keyassociatesinc.com.

Editor's note: This article first appeared in the June 2008 issue (Volume 3 No. 6) of *Leader's Edge*, an e-newsletter published by the American Marketing Association® (AMA), and is reprinted with permission of the author and i4cp.

Don't be afraid of the coach. At one point, having a coach carried a stigma because it was often directed at problem employees. Now it's more likely to be a sign that you're on the fast track and that your organization is serious about raising performance levels and developing talent, according to an extensive global study commissioned by American Management Association® and conducted by the Institute for Corporate Productivity (i4cp).

The study was based on a survey that included 1,030 respondents. When asked about the groups that their organizations coach, 60 percent of respondents said the coaching involved high-potential employees "a lot" or "a great deal," and 42 percent said the same about

executives. By contrast, just 37 percent said they coach problem employees to such a high extent.

The study defined coaching as "a short-to-medium-term relationship between a manager or senior leader and a consultant (internal or external) with the purpose of improving work performance." (Douglas and McCauley 1999) And this study showed that coaching is indeed linked to improved performance, both at the individual and organizational levels.

Respondents from organizations that use coaching more now than in the past are more likely to report two kinds of advantages. First, they are more likely to state that their organizations have higher levels of success in the area of coaching. Second, they are more likely to say that their organizations are performing well in the market, as determined by self-reports in the combined areas of revenue growth, market share, profitability and customer satisfaction. What's more, the study found that raising individual levels of performance is the No. 1 reason for using coaching and that using coaching for this purpose is highly correlated with the success of coaching programs.

But there are many ways of designing and implementing coaching programs, and not



all are equally effective, the study found. So which practices are most highly correlated with success? For one thing, the study found that sending potential coaches to external development programs was more strongly correlated with overall

coaching success than more internally focused methods. Yet, those external programs were less commonly used, suggesting that strong consideration needs to be given to using external coaching programs to enhance internal results.

The study also found that clarity of purpose counts. The more a company has a clear reason for using a coach, the more likely that its coaching process will be viewed as successful. Add measurement into the mix and you have a winning formula. The AMA/i4cp research indicates that the more frequently respondents reported using a measurement method to gauge coaching effectiveness, the more likely they were to report success in their coaching programs. The measurement methods that were most strongly linked to success are individual increases in productivity, impact on engagement, satisfaction with the program and bottom-line results on the business.

Another coaching best practice is related to selection. Survey participants were asked to what extent their organizations use certain criteria to match coaches with coachees. By far, the most frequent basis for matching is the area of the coach's expertise. Almost three-quarters of respondents (74 percent) said matching decisions were — either frequently or a great deal — based on finding a coach with the right expertise to address specific issues. Matching the right expertise with the right client is associated with higher success rates.

The study also shows that it pays to interview coaches. Surprisingly, when asked about the criteria they use to select coaches, only 54 percent said they interview potential coaches frequently or a great deal. Yet, this basic step is more correlated with reported success of coaching than any other selection strategy. Both time and money are wasted when organizations fail to invest time up front matching clients with coaches.

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What Really Works When It Comes to Coaching

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Another coaching best practice is to know when to use an internal versus external coach. The research indicates that external coaches are hired most often to work with executives. External coaches are significantly less likely to work with managers or supervisors. Internal coaches are almost equally likely to work with managers as they are supervisors, but they are significantly less likely to work with executives. Additionally, while internal coaches were assumed to coach employees at all levels of the organization (43 percent), very few respondents (5 percent) said that external coaches coach employees at all levels to any great extent.

The study also indicates that using internal coaches to coach managers or executives is not correlated with coaching success. It appears that using external coaches for those groups is more effective and perhaps confirms that the higher cost of using an external coach is worth it.

An interesting finding that has best-practice implications for global organizations is related to providing coaching to expatriates. The study found that providing coaching to expats is associated with coaching success and improved market performance. Yet, few companies report that they offer coaching to this segment of their employees, suggesting that there's an opportunity for competitive advantage here.

The study also found that there's room for improvement in various areas related to coaching. For example, only about a third of respondents (32 percent) considered peer coaching (in which each participant acts as both coach and coachee to a partner within

the organization to improve growth and development) to be very effective or extremely effective. That finding indicates that most organizations have yet to determine how to reap maximum benefit from their peer-coaching programs.

In general, the AMA/i4cp team believes that coaching remains an untapped opportunity for many organizations. Only about half of responding North American companies said they have coaching programs in place, and the same is true for just 55 percent of respondents in the international sample. This suggests that there's considerable room for coaching to expand and mature, becoming a critical variable in developing and retaining scarce talent in the future. Companies that learn to leverage coaching and build their programs on what works will have a significant competitive advantage in the global marketplace. ■

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Social Networking

by Karen Butcher, CPCU, CLU, AIM, AIAA



Karen Butcher, CPCU, CLU, AIM, AIAA, began her career in the insurance industry in 1978 as an underwriter with State Farm in Columbia, Mo. Her current position as a learning and development specialist gives her the opportunity to work with employees and agents on their professional development as well as product knowledge. She is a graduate of Truman State University with a degree in education. Butcher has been a member of the CPCU Society's Central Missouri Chapter since earning her designation in 1985 and has held chapter offices and served on numerous chapter committees.

My Gen Y son recently texted me a congratulatory message on my plunge into the social networking pool. For several years, I had edged away when conversation turned to who had made long-lost connections with friends on Facebook or MySpace, or had nodded, as if in knowing agreement, of the antics seen on YouTube. Visions of 1984's "Big Brother," or some cyber-spy knowing my every keystroke and every thought, haunted me. I was a baby boomer afraid to try the waters of social networking.

Just what is social networking? According to Wikipedia, "a social network service focuses on building online communities of people who share interests and/or activities, or who are interested in exploring the interests and activities of others." Social networks began benignly as shared e-mail addresses or Web sites. In the mid-1990s, online communities formed to allow people to interact with each other through chat rooms and personal homepages. Some communities focused on linking users with common ties, such as schoolmates (e.g., Classmates.com, 1995), common friends or similar interests (e.g., SixDegrees.com, 1997).

As we entered the 21st century, new social sites began to emerge, giving users more control and wider connectivity. A forerunner of social networking sites, Friendster, was followed by the more popular MySpace and Bebo. In 2004, another competitor, Facebook, began gaining in popularity. And 2009 has seen a dramatic rise in the prominence of Twitter — a real-time short messaging service that works over multiple networks and devices. Social networking also has begun to anchor a position as part of the business world in both marketing and business relationships, as evidenced by the growing popularity of LinkedIn.

In general, social networking services comprise two types: an internal social network or an external network. An internal network is a closed or private community consisting of users within

a company, organization or educational facility; it may also be by private invitation only. An external network is open to the public, allowing all users to participate, or it may be a smaller specialized community linked by a single, shared interest. External networks are usually maintained by a developer and supported through advertising. Both services normally have shared features such as creating a personal profile, privacy settings to control the distribution of information, and the ability to share photos or private entries as well as the ability to share entries through blogs. A search of major active social networks produced 255 Web sites, varying in focus based on national, geographic or cultural bases; political or professional interests; or shared interests in music, movies, art, hobbies, etc.

Use of social networks continues to grow at an impressive rate. Nielsen Online, which measures Web traffic, reports that the number of minutes on social networks in the U.S. rose

83 percent in April 2009 from April 2008 — but users are quick to abandon one site to move to another that's currently in favor. Facebook users spent 13.9 billion minutes online in April 2009, and Facebook continues to enjoy popularity as the No. 1 site, with more than 200 million active members, including Pope Benedict. MySpace is the second most popular site, followed by Blogger, Tagged.com and Twitter.com. (Reuters) Even Barack Obama's presidential campaign borrowed on this concept by launching a Web site that operated like a social networking site.

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Social Networking

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Who are using social networks? While we may have a tendency to assume that social networking is dominated by teens and Gen Y, older demographic segments are adopting social networking in order to keep up with family, friends and colleagues. Research by Pew Internet and American Life Project reveals that the “vast majority of online adults from all generations use e-mail and search engines,” but that “while there are exceptions, older generations typically do not engage with the Internet past e-commerce (online shopping, banking, travel reservations). However, growth of usage continues in this area, as one-third (35 percent) of American adult Internet users now have a profile on an online social network site, four times as many as three years ago (8 percent in 2005), but still lower than the 65 percent of online American teens who use social networks.”

How is social networking affecting our business world? As a business tool, social networking is still relatively new, but it has the potential to create transformational change in consumer behavior and resulting marketing and publishing strategies. Participation in online social networks now accounts for one in every 11 minutes spent online, ahead of time spent on personal e-mails. (Nielsen) Networks recognizing this trend are expanding to organizations and individuals looking for networking and marketing opportunities.

One of the largest business networking Web sites, LinkedIn, now has more than 34 million users. In addition to promoting professional relationships between people, this networking site can help users find new customers, new jobs and new employees, as well as suppliers, partners,

expertise (internal and external of your company) and other information, to be successful and efficient in your position. (Vermeiren, 27) Professional organizations are using LinkedIn to increase membership as well as stimulate interaction among existing members.

Are you ready to give social networking a try? The Leadership & Managerial Excellence Interest Group has joined LinkedIn to allow members to interact with each other to discuss leadership, management and quality-related issues of interest. You can locate our group and create a profile under the title of The CPCU Society — Leadership and Managerial Excellence Interest Group: http://www.linkedin.com/groups?gid=1931539&trk=anetsrch_name&goback=%2Eg. ■

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Solid Steps to Something Special

by Peter deJager

Peter deJager is a speaker, writer and consultant on the issues relating to the rational assimilation of the future. He has published hundreds of articles on topics ranging from problem solving, creativity and change to the impact of technology on areas such as privacy, security and business. deJager's articles have appeared in *The Washington Post*, *The Wall Street Journal*, *The Futurist* and *Scientific American*. In addition to presentations and seminars on the topics above, he writes about a dozen regular columns.

Editor's note: Peter deJager has been a mentor and a mentee. The latter was easier; the former was more rewarding. You can contact him at webinars. technobility.com or at pdejager@technobility.com. This article is printed with permission. © 2009, Peter deJager.

If you got to where you're at — in a single easy step — then chances are you haven't failed enough to have learned very much. On the other hand ... if your journey was long and difficult, if you made more mistakes than you needed to but persevered and arrived at where you're standing, then something special might have happened. If you can now look back and ask, "I made it through all that?", then it's possible you unknowingly picked up something of value along the way — a little bit of wisdom.

Wisdom isn't a medal that you get because of experience. It's a rare by-product of experience. Unlike a medal, which is perfectly satisfied when stored in a little box atop a tall shelf, wisdom would much prefer to work. Sadly, many with wisdom are all too willing to rest on their laurels, content to have arrived.

I sense that you're not one of those and that you're willing to put your wisdom to work ... not a lot — just a little bit. If that's the case, how'd you like a new adventure? How'd you like to be a mentor? What's that you ask? Ah ... well,

pull up a chair and listen up, it's not like anything you've done before — but the rewards might be more than you can imagine.

Here's the basic question behind the idea of "mentor": How much would it have benefited you if someone could have steered you, just a little bit, through some of the more difficult passages of your journey to where you are? They wouldn't have taken control of the steering wheel, just whispered in your ear when you could have used a second opinion, some honest feedback, or just some gentle, probing questions to help you think just a little bit better.

If you are indeed the type of person I think you are, I'll bet you've already seen some up-and-coming youngster in your organization — even in your neighborhood — and said to yourself, "That person could go far if only they had some gentle guidance."

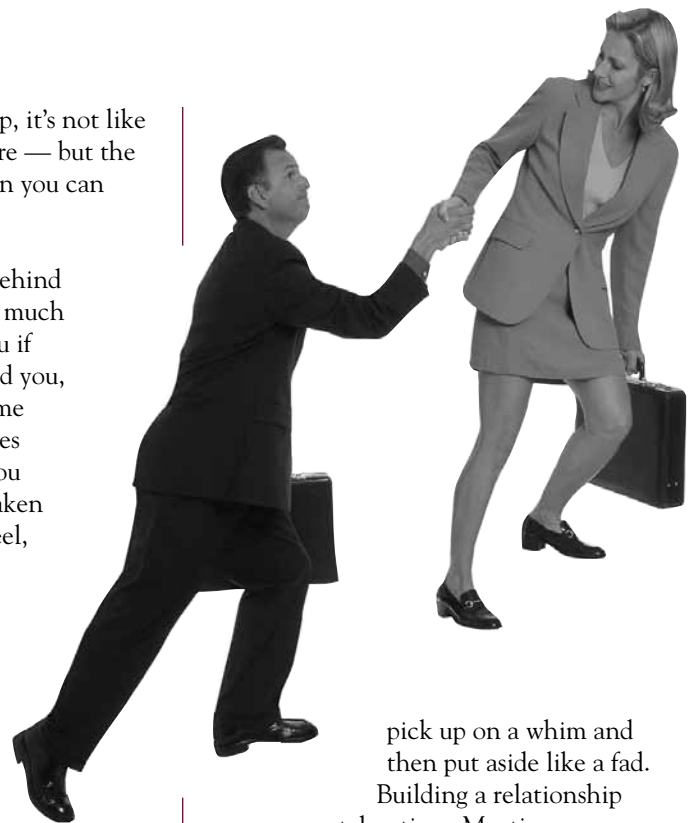
Head to your local bookstore, and you'll find dozens of books on the mentoring process. But in the end, it's all about someone with experience — and passing that experience along to someone who might be able to take advantage of past lessons learned.

You'll notice a lot of qualifiers. There's no guarantee that we can learn from the experience of others. It's difficult enough to learn from our own experience! Yet, the hope is there, and that's enough for some to make the attempt.

So, with the groundwork put in place, what can we do to give this notion of mentoring someone a fighting chance?

- **Commitment.**

It should go without saying — which is why it needs to be said loudly and clearly. Mentoring isn't something we



pick up on a whim and then put aside like a fad. Building a relationship

takes time. Meetings

scheduled are meetings held. Promises made are promises kept. Without this degree of commitment, mentoring relationships will melt faster than a child's ice cream cone in the hot sun.

Mentoring doesn't involve heavy lifting, but it's serious work, nevertheless. Frankly? Carrying a load of bricks is less difficult than honoring time commitments of a mentoring relationship. And the rewards of the latter will far outweigh that load of bricks.

- **Honesty/Integrity/Confidentiality.**

For a mentor to be of any use to a mentee, there will need to be a great amount of trust shared between the two. You'll be sharing dreams and aspirations, strengths and weaknesses, hopes and fears — you can't do that on anything less than a high degree of trust. What is shared must remain private within the extent of the law. A mentor/mentee relationship is not a privileged one in the eyes of the law, but in every other aspect, it must act as if it were.

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- **Expectations, Goals and Boundaries.**

What are you willing to do for a mentee? What should you do? What won't you do? Why? Are these boundaries understood by both parties? How will you handle misunderstandings? How will you communicate the boundaries in the first place? The honesty/integrity/confidentiality observations above provide some clues as how to handle these issues.

- **Learn to Question ... Learn to Listen ... Try to Understand.**

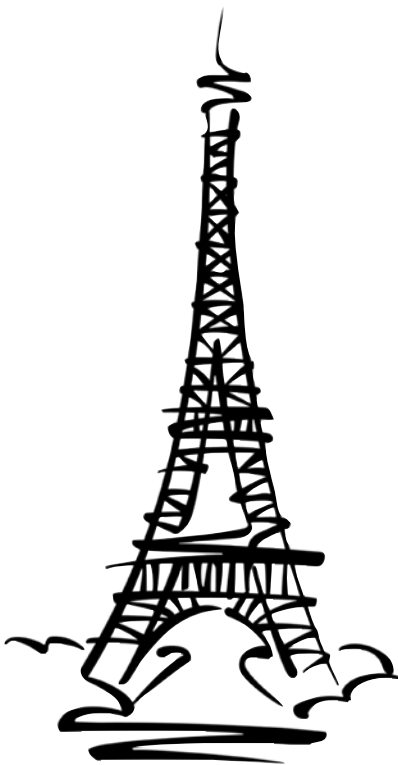
It is tempting to comment on each of these independently, but they are so interrelated that doing so is pointless.

A goal of the mentor is to understand the mentee as much as possible. Otherwise how can the mentor frame what he or she knows so as to be of value? To do this, the mentor must ask deep questions that expose the mentee's thinking, and listen even more deeply to the answers.

Any question that prompts a "yes/no/maybe" response is ineffective. Questions that ask, "Why did ... ?" can generate a defensive stance. So, what remains are, "What if ... ?", "How would ... ?", "Tell me about ... ?", "What do you think about ... ?", and of course, "How did this make you feel?"

None of the above is enough to prepare you to be a mentor. My goal in writing this little piece is to do nothing more than perhaps tease you with the notion that you have a lot to offer — and give a warning that being a mentor isn't something to take lightly.

Most people aren't up to the task. Many think they are. Ideally, there is no overlap of those two categories. ■



Paris in the Springtime

CPCU Travel Program Presents

The Seine — Paris to Normandy

13-Day River Cruise Beginning April 6, 2010

See the sights of Paris and then cruise and tour the villages of France along the Seine to Normandy.

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Questions?

Contact Dick Vanderbosch, CPCU, at (970) 663-3357 or rbosch@aol.com or visit <http://seniorresource.cpcusociety.org>.

Leadership Legacies ... The Give and Take of Generations

by James L. Britt, CPCU



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Setting the Stage ... 'Old' and 'New'

Much has been preached in print and from the podium about the dynamics of generational change we are now experiencing. I must profess that I filter the pundits' and social scientists' opinions and statistics through the filter of a leading-edge baby boomer. Therefore, I know that readers of this epistle will filter my commentary through their own generational (or sub-generational) filters. Have at it! That is the wonderful process

of reflection and discussion that makes our professional business enterprises so interesting.

With my bias noted, and inviting yours, let me share portions of a wonderful letter written within the past year by **Julian Emerson**, chairman of The Chi Psi Educational Trust Inc. This institution funds leadership development for undergraduates on college campuses who are members of the Chi Psi Fraternity. I was blessed to have that fraternal experience during my days in residence in Chapel Hill. Emerson, in writing to the graduate brotherhood, offered some personal perspectives as premise for the need to accelerate leadership training funding for the near horizon.

Two passages from the letter resonated with me:

"Our colleges and universities are now completely enrolled with undergraduates from the millennial generation. These students bring a dramatic new paradigm to our campuses. They are the most academically prepared students ever. They value ethics, experiential learning, social justice, community service and structure. They are highly motivated, set goals and have a high sense of self-worth."

"Despite the holistic persona of these students, they arrive at the institution's door with challenges. Technology has made communication more frequent, but stymied interpersonal skills. Shifting social mores have weakened adherence to etiquette fundamentals. Over-programmed childhoods have led to insecurities with decision making. Parental oversight now transcends the collegiate experience and the choices made by our student."

I believe Emerson has appropriately summarized the post-adolescent that is

migrating through higher education and preparing to enter our workforce. Realize that these students will flow, over time, into our roles. They will form an eventual leadership generation in the property-casualty insurance business. How do we adjust our behavior to assure that these emerging professionals, and the leadership potential within, are appropriately equipped to take the reins beyond our foreseeable horizon?

Transferring Legacies ... Then and Now

We now have a multigenerational hierarchy of experienced professionals active in our industry: traditionals, boomers, Gen Xers and Millennials. And we all are composites of legacies imparted by great teachers, coaches, mentors and role models. Accepting their gifts of experience, knowledge and wisdom adds these treasured nuggets to our persona.

Endeavoring to accept their best practices and incorporate these elements into our own personality and behavior, we balanced all with our own intellect and emotional discipline. Some pieces did not fit, but many are permanently embedded in who we are. We are living mosaics of many gifted and generous professionals. Some of us are relatively complete, while others are still a work in progress. All of us need to continue to grow.

Questions remain for those of us who have been fortunate enough to build a warehouse of professional and leadership skills:

- Have we intentionally imparted legacy gifts to those following us?
- Do we know how to reach generational partitions with which we (or they) create social friction rather than harmony?
- Are we positioned with time and space to act now while the young fruit is ready to be ripened?

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Leadership Legacies ... The Give and Take of Generations

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CPCUs ... Prepared Professionals ... Act Now!

If you have already established a pattern of professional sharing, dig a bit deeper and engage a broader cadre of potential stars. If your organization needs a champion to re-emphasize structured teaching, coaching or mentoring, be that special leader who facilitates opportunity for CPCUs to be the best on a bigger playing field. Look for role models to identify for others as exemplary best-practices leaders.

As we gather from time to time, whether it's locally, nationally or in the global arena, let's celebrate our giving to oncoming leaders and, yes, celebrate their willingness to take our legacies and mold these pieces of our professional personas into theirs. They will be their own people, but let it be said that we

positioned them to be more able and more willing to serve because we found the time and means to serve them.

The time is now and the storehouse of legacies abounds in the ranks of CPCUs throughout the U.S., in fact the world. Be bold in your work and confident in successful outcomes. ■

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