



# Noble Calling

## Five characteristics of true leadership

I've always found it easy to write and speak about leadership, as I find it so fundamental to everything that we do. Leadership truly is a calling for those who embrace it. In that vein, I'd like to share five critical components of leadership with regards to the future of insurance and investment advisors.

### 1. You are perfectly equipped to get the results you are getting today.

If you want to keep driving forward, you need to keep evolving your skills and your thinking. I once heard Deepak Chopra speak at a conference and he said something that went right to my core. His point was that everything I had accomplished up to that point in my life had positioned me perfectly for exactly where I was in my life. In order to keep driving forward, I needed to take charge and decide where I was going to go next and then get busy learning how to do just that. I'll give you a practical example for our business. Most leaders in our business do a great job of recruiting, selecting, and on-boarding new agents or advisors. Some leaders have great coaching skills that they can use to unlock potential. What do you need to evolve your business? You don't need to have built your own practice to learn how to help someone else build theirs. Many of the great coaches in professional sports did not play at the level of their players. They decided to become great coaches and have built their expertise in that field. You can build it in any field, you just have to make that decision.

### 2. Leadership actions consist of a set of learned skills and built habits.

I believe everyone can be a leader if they are willing to work for it. This component for me is the combination of the great leadership research from Jim Kouzes and Barry Posner and the timeless article from Albert E.N. Gray entitled "The Common Denominator of Success." By deciding to become a better leader and by doing the

work that great leaders do, even when you may not want to do it yourself, you put yourself on the right path.

### 3. You own your efforts and your results.

You must lead by example. The speed of the leader is the speed of the pack. People don't go as fast as they can, they go as fast as the leader. We are in a world where the pace of change is exponential, not linear. What used to take months to complete can now be done in minutes. Complete industries are being transformed as the technology becomes faster and cheaper, but it does not happen on its own. It is being marshalled by great leaders who are seeing opportunities, and using any and all of the tools at their disposal. The changes are not just technological. The regulatory, financial, and client experience components will all continue to evolve quickly. In this vein, check out the Canadian Life and Health Insurance Association's white paper on mandatory needs analysis found at [clhia.ca](http://clhia.ca). If you think their findings are still a long way off, you are ignoring a massive shift in our business, and you and your team will suffer the consequences of ignoring it. Be a leader — understand the shifts and go take advantage of them.

### 4. A leader is a dealer in hope.

This is such a fundamental component that I almost put it at the top of the list, but it really is just a specific skill set that needs to be learned, practised, and used all of the time. You have an obligation to give people that you are tasked with leading a vision and mission that inspires them, engages them, and allows them to have hope. Hope for a better future, hope for a great office environment to work in, hope that their leaders will be there for them when things get tough, and hope that the companies that offer the insurance and investment products will be financially responsible and strong. You are the face of all of these ele-

ments for your agents and advisors. You are the dealer in hope.

### 5. Leadership is a privilege, responsibility, and opportunity.

We need to keep attracting more people to management and leadership roles. We also need to recognize that many agents and advisors are providing a leadership role to their teams of administrative assistants and sales assistants, developing advisors or agents who might be working in a team. They need support and development tailored to their needs just as much as the managers and other leaders do.

If you have recently decided to pursue a leadership role, congratulations, it is an amazing role. If you have been doing this for a while, you know the value you bring and the difference you make in people's lives. No matter where you are on your journey, remember this: it is a privilege to be able to serve others in this capacity.

As you read this, I will have recently celebrated my 25th anniversary in this amazing career. It has been an incredible journey filled with great people, places, and events that will forever hold a place in my heart. To all of you who have been part of this with me, I want to say thank you for everything you have brought to my life, and I hope in some way, I have added something to yours. I'm looking forward to the evolution of our business, confident that we have incredible leaders and advisors across all of our various companies, helping Canadians live more financially secure lives. It is a noble calling and I am proud to be a part of it. Thank you for the privilege. 🙏

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