

Skype, which allows you to hold virtual “face-to-face” meetings; and Dropbox, which you can use to access files regardless of your physical location.

- **Voice-over IP (VOIP) phones:** Telephones with VOIP capability that function via Ethernet connections allow clients, colleagues and media to call you at a normal practice extension over an Internet connection. This allows you to save significantly on cost from traditional landline services—vitaly important if you are consistently working with clients who don’t have the means or the time to stop by your agency storefront. This low-budget, high-quality service can help you stay in constant communication.

- **Conferencing software:** Using applications like GoTo-Meeting provides the opportunity to conduct meetings with clients across the globe. With webcams, clients can see your desktop on their computer and easily follow along as you update their wealth management plans, discuss important transactions and more.

“Improving your agency practice requires that you provide greater transparency.”

Improving your agency practice requires that you provide greater transparency, faster information and improved service. Successfully integrating more technology into your management strategy can appeal to the convenience and responsiveness that clients have come to expect in this digital age—which will create more opportunities and strengthen your existing relationships.

J. Leland Davis and Jeremy Davis operate Denver-based wealth management practice J. L. Davis Financial Corporation, which does business in 30 states.



WHERE TO TURN

These days, you don’t have to be your own technology guru. A myriad of resources are available to help you thrive as a successful virtual advisor. If you are looking to find expert help to implement technology in your agency, here’s where to start:

- Contact your local college’s computer science department
- Ask another agent about their own systems
- Find a competent IT professional —J.D.

OFF THE SHELF



THE POWER OF UNDERSTANDING PEOPLE
THE KEY TO STRENGTHENING RELATIONSHIPS, INCREASING SALES, AND ENHANCING ORGANIZATIONAL PERFORMANCE

By Dave Mitchell

There’s something about exercises in introspection when co-workers do them together. When someone divulges characteristics of personality types, people shoot not-so-subtle glances and name names—and usually everyone laughs. The exercise can be fun and, if approached as Mitchell describes, extremely valuable to your agency. His comprehensive system for pinning people by personality traits is light, accurate and important for pairing contrasting types. Excellent ideas on sales approaches, conflict resolution and goal-setting will prove helpful to any agency, big or small.

★★★★



THE UP SIDE OF DOWN
WHY FAILING WELL IS THE KEY TO SUCCESS

By Megan McArdle

Insurance. Is there any other industry so reliant on risk—yet so averse to it? When people try new things, they usually fail. Without that failure and acceptance of it, nothing would evolve, progress would never happen and creativity would be a dying breed. McArdle’s take on the massive fear of failure cultivated by organizational leadership is fascinating from start to finish. As evidenced in this witty and razor-sharp text, the most successful companies are led and grown by people who fail constantly.

★★★★



EVERYTHING CONNECTS
HOW TO TRANSFORM AND LEAD IN THE AGE OF CREATIVITY, INNOVATION, AND SUSTAINABILITY

By Faisal Hoque and Drake Baer

When the authors say “everything” in the title, they mean it quite literally. This book is a great adventure that begins deep within the mind and makes pit stops in various boardrooms, cultures, religions, historical figures and events along the way. The tips included here are not one-and-done business-related growth ideas; rather, this text is a soup-to-nuts revolution starting with self. It’s fascinating, with shocking correlations throughout you never even knew existed. From fabulous writing to humor and sheer mental depth, the authors have woven a simply wonderful read.

★★★★★