Coaching an Uncooperative Employee  
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by Beverly Flaxington

Beverly Flaxington is a practice management consultant. She answers questions from advisors facing human resource issues. To submit yours, email us here.

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Dear Bev,

Is it possible to coach someone who doesn’t really want the job they have?

Mary E.

Dear Mary,

This is one of the most succinct yet deep questions I have received. My mind is racing with all of the questions I would ask you:

- Does the person want to be coached?
- Have they shown any aptitude at all for the job?

- Why are they in this role? Was it their choice or the advisory firm’s choice?

- Do they welcome coaching and are they responsive to making changes?

- How far apart is what they do naturally from what the job requires? What’s the leap they have to make?

- Is coaching the only option you have or are willing to try?

- Are there other resources for this person?

- How long have they been in this role?
• Are the expectations for success really clear and known to the person?

My short answer is that coaching actually does not work for everyone. Many people can make change happen and willingly do so but some are in a place where, for a variety of reasons, they are not able to make the changes needed to be successful. I encourage you to answer these questions for yourself or your firm and then take a fresh look at whether coaching is the best avenue for this employee in this situation.

Dear Bev,

I am speaking for the first time at a conference for our target market. It’s actually a convention of sorts for dentists. We work with many in their own private practices and have carved out a niche with our planning process. In my experience, dentists typically don’t know a lot about financial information, so I don’t want to baffle or bore them. On the other hand, I don’t want to talk down to them or appear like I don’t know what I am doing. How can I make this presentation most effective?

Cat E.

Dear Cat,

I appreciate the level of detail you provided in this question. I can picture the audience and I can understand your desire to talk to them but not at them. There are a few things you can do to make your presentation have the highest impact for your audience:

1. If possible, talk to the conference organizer. Find out what participants know or would like to learn. They may have some insights from past conference surveys on your topic.

2. Insert a few words or ideas that are specifically relevant to dentists. If you know their jargon from working with them, use it now so they recognize this presentation as directed at them.

3. Use colorful and provocative slides. Keep them engaged!

4. Have a clear flow to your presentation. Pick the top 3-5 points you want to make. Lay them out at the beginning and then refer to each section as you go through it.

5. Insert questions or activities to get them engaged. Again, it’s always best if it can be something relevant to their lives or profession.

6. Have a call-to-action. What do you want them to do as a result of listening to you? State this at the beginning and again at the end as you bring your remarks to a close.

Best of luck with this presentation. It sounds like a great opportunity for you to cement yourself as the expert to this audience!
Beverly Flaxington co-founded **The Collaborative**, a consulting firm devoted to business building for the financial services industry in 1995. In 2008 she co-founded Advisors Trusted Advisor to offer dedicated practice management resources to advisors, planners and wealth managers. She is currently an adjunct professor at Suffolk University teaching undergraduate students Leadership & Social Responsibility. Beverly is a Certified Professional Behavioral Analyst (CPBA) and Certified Professional Values Analyst (CPVA).

She has spent over 25 years in the investment industry and has been featured in Selling Power Magazine and quoted in hundreds of media outlets, including the Wall Street Journal, MSNBC.com, Investment News and Solutions Magazine for the FPA. She speaks frequently at investment industry conferences and is a speaker for the CFA Institute.