

5 TOP TAKEAWAYS FROM FSI ONEVOICE 2019

The [FSI OneVoice 2019 event](#) in New Orleans this year was a blockbuster. Great program sessions and lots of engaging discussions among participants and exhibitors. Xtiva was in the house, taking in the sessions and getting inspired.

Here are some stand-out observations from the Xtivans who participated in the event.



HOW TO THINK LIKE AN INNOVATOR

Talk about hitting it right on the head - what a great way to get things started!

[Jay Shetty](#) outlined we must be able to learn fast, BUT also to unlearn and relearn to stay ahead of the times and innovate our businesses, communities and lives.

The key takeaway was that Innovation requires four mindsets:

1. **Have a connection mindset.** Be a connected thinker. Strive to find association between seemingly unassociated things. We create fragility by surrounding ourselves with people who think exactly the same as us.

2. **Adopt the coach mindset.** Don't try to emulate someone else's style. Combine different styles. Promote mentorship. Coach talent according to their unique talents.
3. **Have a monk mindset,** the ability to see something that is ordinary in a completely unique way. Your brain can't be truly logical and truly creative on the same day.
4. **Have a coder mindset.** Be open to constant change. Be a continuous learner. Be more critical in your thought.

~ [Jodi Taylor](#), VP Customer Success

WHAT ARE YOU DOING TO NURTURE TALENT DRAINING OUT OF YOUR ORGANIZATION?

Ten thousand baby boomers retire every day, resulting in a continual drain of valuable leadership experience and skill from our industry's C-suite. Many organizations innovate with products and marketing, but struggle with building great teams. Teams are more than just the people, they are a system.

Key takeaways: The talent gap is a real risk to the future success of every organization. All panelists reported doing some type of formal succession and development planning and training. Tomorrow's leaders need to focus on establishing the right culture. They also need to be critical thinkers, complex problem solvers, creative, diverse – and great communicators.

Thanks to the stellar panel for this great session: [Tom Berthel](#) (Berthel Fisher Companies), [Scott Curtis](#) (Raymond James), [Mary Nelson](#) (Allstate), [Bill Brady](#) (American Funds by Capital Group).

~ [Rick Searbo](#), Chief Revenue Officer

BUILDING VS. BUYING TECHNOLOGY

It's one of the toughest questions, especially in these times of rapid technological innovation: build or buy? The answer – for most firms – is probably BOTH!

[Frank Smith](#) of First Command Financial Services offered the clearest takeaway: If it's client-facing and improves the client experience, then they'll build. If it's more of a commodity function (for example, CRM), then they'll buy. What's critical is to understand how important it is to control the application. "Build where you can win! Buy when having the 'best solution' doesn't make you a market leader or when you have limited budget, time or expertise."

~ [Scott Webb](#), Director of Sales

HOW TO MANAGE TALENT IN THE NETWORKED AGE

The employer-employee relationship faces a seemingly impossible dilemma: you can't guarantee a lifetime of employment, yet how do you build a lasting, innovative business where everyone acts like a free agent?

[Ben Casnocha](#)'s solution is innovative: stop thinking of employees as family or free agents, and start thinking of them as allies on a tour of duty. The alliance approach requires employers and employees to adapt together. A "tour of duty" has a mission objective and a set duration with benefits to the employee's career and to the company. And the best part: there's an opportunity for transformation for both parties once the tour is complete.

~ [Sandra Villi](#), Manager of Event Marketing and Engagement

Thank you for an engaging hour [@mimi_bock](#), Jodi Perry, Valerie G. Brown and Evamarie Schoenborn – getting girls into financial services is so important for women everywhere and their financial futures! [#OneVoice19](#)
pic.twitter.com/jC8CNghoqM

– Xtiva (@xtiva) [January 29, 2019](#)

THE FUTURE OF FIRM LEADERSHIP IS FEMALE

You don't see a lot of all-women panels at financial industry events, let alone an all-women panel of firm leaders discussing strategies for growth and success. Kudos to FSI organizers for programming this session!

So much was unpacked during this session. The need for (and the benefit of) women in leadership positions. Inclusion. Diversity. Eliminating unconscious bias when hiring. Getting girls and young women interested in financial services careers earlier. How to get your women advisors to be your top advisors (not just filling the ranks). Women as the client of the future. The importance of curating impactful content for your clients. The importance of staff in serving clients. And the role of technology. Thank to this panel for an engaging hour: [Valerie Brown](#) (Advisor Group), [Jodi Perry](#) (Raymond James), [Evamarie Schoenborn](#) (Northwestern Mutual), and [Mimi Bock](#), Cetera Advisors and First Allied Securities).

~ [Jodi Taylor](#), VP Customer Success



Xtivans at FSI (l-to-r): Scott Webb, Sandra Villi, and Jodi Taylor.