



A CEO to CEO Newsletter

from the desk of Bob Wilson

A Tribute

Dear Fellow CEO:

Other than myself, our longest-term employee at ADVISA is Peggy Gaylord. She started with us in January of 1995. We've worked together for a long time. If you've not met her, she's smart, fun-loving, gracious, easy to be around, fashionable, witty, charming and most of all - a good person. She's retiring from our firm at the end of this year. I'm going to miss her. I'm guessing so are many of you. She is a class act.

I'd like to share a little bit about our mutual history and give you a sense about Peg in the process. If you have a slightly better picture of Peg as a result of reading this, that will serve you well. She's that kind of person.

Dave Lear, president at the time of a Fort Wayne company called KLF, introduced Peg to me. Dave knew I was looking to hire a consultant. He and a group of friends - including Peg's husband Don - regularly had coffee at a local spot before work. In that way, he had made Peg's acquaintance and he was impressed. Peg had been leading a large Fort Wayne non-profit for many years and, armed with her MBA, wanted to move into the world of for-profit business. Dave hadn't done her profile but thought she'd be right for us.

Peg and I met at the Guest House in Fort Wayne in September 1994 for a casual interview over breakfast. We chatted for a while. When it became clear it was worth going to the next step, I gave her a PI@ to fill out. Once she finished, I used the old fashioned scoring stencil (that preceded the computer) to count all of her checkmarks and thus create her survey results.

In situations like this, using the stencil to score a PI was an exercise in anticipation - for both parties. I knew what I wanted and I couldn't count the words fast enough. She was in the same boat but only knew she wanted a "good" score. The general flavor of the words she checked gave me a sense of what I was going to get, but I couldn't get there fast enough. Inevitably, as a result of my overzealousness, I'd find, on doing the double check, I'd screwed something up in the multiple counts. My haste would drive me to have to start all over. I don't pretend to remember how many times I counted Peg's checklist but I'm guessing it was a couple before I got it right. Sheesh!

Eventually, the numbers checked out and her profile came out as I'd hoped. After multiple

failed efforts, she was what we were looking for! While I probably didn't smile outwardly, I definitely did smile on the inside. Finally, a possibility! We talked for some time and I said I'd get back to her. I liked her for all the reasons mentioned above. But, there were a few concerns. A non-profit background seemed like a stretch for my second employee. While she had fund-raising experience, she hadn't had business-to-business selling experience. She hadn't consulted. She didn't have for-profit business experience. She didn't know anything about PI. It seemed like an awfully steep learning curve.

She wanted the job. As time went on, and I mulled the decision, Peg called me regularly to press her case. She also enlisted Dave to make a couple of calls on her behalf. I just wasn't sure. But, she and Dave kept bugging me. After several months of looking, I finally decided to offer her the job. It was a good call. She started January 3rd, 1995.

As you can imagine, in those days at ADVISA there wasn't much of anything in place for a new employee. There was no formal training program; no written job description; no performance measures, insurance, office, or policies - in short there was nothing much except the promise of a hand-written pay check at the end of the month. When Peg had asked somewhere in the midst of the interview process, "What benefits do you provide?" I had to stop and think. The only answer I could come up with was, "The pleasure of my company..?" I thought it was a pretty witty response, but it really was about the only benefit Peg had access to. She wound up taking the job in any case.

The first several months of Peg's employment were spent either in my basement office, the passenger seat of my car, or in the office of a prospect or a client. We were together constantly. Peg studied at home and practiced giving me PI answers and training me in the seminar as we drove across the Midwest - Indiana, Illinois, Michigan, and Ohio. Wherever we had clients, Peg and I would traipse to their offices and use the time in between to learn the business. I'd play the roles of client, prospect, trainee and boss, and she played the role of grillee. She had the patience of a saint.

I'm guessing she developed thick emotional calluses too. You see, I'm not the easiest person in the world to please. And at that point in my managerial career, I hadn't learned to temper my bluntness or sarcasm (some would say that tempering still needs work). Both were exhibited in full flower. Peg took it all and came back for more. She worked diligently and relentlessly to become proficient both in the language of PI and its facilitation. She made her own success happen in what I'm sure were very difficult circumstances.

Finally, she was given the opportunity to develop clients on her own. She'd send letters; do cold calling; and her own invention - "drive-by PI" cold calls. Many of these turned into clients we still have today. (I'm guessing some of you reading this note are former victims of Peg's business development programs. If so, drop us both a note with your recollections - we'll get a kick out of them.)

Peg's warm and engaging personality yielded more than business. She made solid friends too. Over the years, as many of you know, I call clients from time-to-time to see how things are going - to assess if we're doing all they would hope that we would do. With Peg's clients, the response I'd receive reflects who she is in a unique way. To my queries, they'd answer, "I really like Peg." And they did. And they do. They will miss her service. I'm betting many will continue as friends. That's how Peg is.

In those early days, my wife, Dana, and I would travel to take our employees and their spouses out for a celebratory dinner around the Christmas holiday. In Fort Wayne, we'd have dinner at the fancy restaurant (Mallory's, at the time) at Don Hall's Guest House. We'd leave our kids in the hotel room to watch TV under the care of our eldest, and Don

and Peg would join Dana and me for a lovely dinner. We'd talk about family, the year just completed and the year in front of us. As time passed, this tradition continued, but it took a different form. Eventually, there were too many employees to travel to see them all individually so we moved it to a group gathering in Carmel. Throughout, Peg has always been among our most coveted dining mates - whether in Fort Wayne or Carmel. The table at which she sits always seems to have the most fun. At her last official holiday dinner as an ADVISA employee this week, she'll be sitting at my table. I want to share in some of the fun she brings first hand.

But, all good things must come to an end.

At the beginning of this year, we talked about Peg retiring from ADVISA to explore new professional opportunities. After 16 years, it was time to celebrate her ADVISA career and create a successful plan for gradually transferring her clients to our newest consultant - BJ McKay.

As with everything else that Peg has done, she threw herself into the transition completely and selflessly. She did all she could to pave the way for BJ's success and the ongoing success of the company. We're in the final stages of the transition process and through it all, Peg's performance has been exemplary. She's been positive, upbeat, supportive and helpful. Peggy Gaylord has been an asset to ADVISA. For those of you who have worked with her, I know she's been an asset to you. We, at ADVISA will always be friends with Peg. I count myself fortunate. Her DNA has become a part of the company. And the company is better for that. Thank you, Peg, from all of us at ADVISA and all of your clients. We'll all miss you.

Thanks for reading.

Bob Wilson
President

*Email your comments and observations to Bob: @advisausa.com,
and to Peg: @advisausa.com.
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