



Advisory Link

Spring 2005

Newsletter

6330 LBJ Freeway, Suite 136
Dallas, TX 75240
972-233-9019

<http://www.advisorylink-dfw.com>
news@advisorylink-dfw.com

Advisory Link Launches First Newsletter

Welcome to the premier issue of the Advisory Link newsletter. Up to now we have reported our growth through the Career Dimensions newsletter. However, with many exciting new developments to report, Advisory Link news will arrive semi-annually as an e-newsletter.

By way of introduction to new readers, Advisory Link is a catalyst for bringing people together to benefit one another. We leverage our contacts and expertise to help businesses and executives enhance their profitability and professional and personal lives. Our two products are Advisory Boards and Exec-U-Link groups.

In this, our first issue, we've recapped some key milestones of our business, recognized many significant achievements of our clients and shared some tips on successful networking. We hope you'll agree it underscores the value of the wonderful relationships that enrich each of our business and personal lives.

We also want to say thank you to all our network colleagues. Without your timely, insightful input, we wouldn't have found some of our exceptional chairs. We want to thank each of you who have provided us with recommendations of terrific women in the communities we have worked. We will continue to value and appreciate your help as we consult with corporations to focus on traditionally underserved populations.

INDEX

[Client Spotlight – MassMutual Financial Group](#)

[Welcome A Board](#)

[WAB Roundup](#)

[Kudos](#)

[Article - Ten Principles of Networking](#)

[About Us](#)

- [What We Do](#)

- [Building the Business to Connect Executives](#)

- [Who We Are](#)

[Prime Office Space Available](#)



Client Spotlight



MassMutual Financial Group's women's initiatives have flourished since their inception in February, 2001. Spawnd by a successful program created by Advisory Link for General Agent Marilyn Harris of HFG Advisors in Dallas, Texas, the Women's Advisory Board (WAB) program has expanded to 12 WABs in less than three years (see [WAB Roundup](#)), including two just starting up in Portland, Oregon, and Washington, DC (see [Welcome A Board](#)).

Diana Ruddick, Vice President Professional Development/Communications at MassMutual Financial Group (MMFG), recognized the potential the Women's Advisory Board program had to influence MMFG's business growth and culture. In addition to Diana's day-to-day responsibilities for all training initiatives, large meetings and conferences, and communication with field offices, the WAB program has become her passion and legacy to the company.

Diana's visionary leadership also initiated a **Women Focus Mastermind/Exec-U-Link** which meets three times a year with the General Agents involved in the WAB program, other select GAs and invited corporate guests. The chairs join this group annually to share their successes, best practices and results.

In addition, MMFG has named Susan Sweetser, Vice President for Women's Initiatives, to further focus the company's efforts on women and their unique financial needs.



Welcome A Board

Spring has brought new members to the MMFG WAB family with boards being formed in Charlotte, North Carolina, Detroit, Michigan, Portland, Oregon, and Washington, DC (Bethesda).

March, 2005—Washington, DC—The Washington Group

This marks the third WAB in the DC metro area and will be led by Jim Van Eperen, the new General Agent of The Washington Group. The Chair, Sheila Books, President & CEO of SRB Productions has just been selected. Sheila is an award-winning journalist, entrepreneur, and advocate for minority and women's issues.

March, 2005 —Portland, OR—MassMutual Oregon Financial Group

Craig Chambers is the General Agent at MassMutual Oregon Financial Services Group. The new chair of this board is Joanne Van Ness Menashe, director of development for individual giving for the Oregon Symphony, and an active leader and advocate for cultural, educational and philanthropic activities in the community.

February, 2005—Charlotte, NC—Hinrichs Flanagan Financial

Tim Flanagan, another award-winning general agent, came to Charlotte by way of MassMutual Financial Group's corporate office. Board chair Sue Breckenridge is vice president, Public Affairs, of Time Warner Cable and is responsible for all public, community, and government relations, as well as the Production Department.

April, 2005—Detroit, MI—Seymour Gill Financial

Barb Gill and Dale Seymour run two offices, in Toledo, Ohio, and Detroit, Michigan. Their chair, Florine Mark, is President and CEO of The WW Group, Inc., the largest Weight Watchers International franchise holder in the country. Planning for their first meeting is underway with the LifeBridge™ program and other potential projects topping the first's year's agenda.



WAB ROUNDUP

A thumbnail sketch of MMFG WABs and their distinguished chairs

February, 2001—Dallas, TX —HFG Financial Advisors

With a vision of what a Women's Advisory Board could accomplish for her, her agency and women in the community, General Agent Marilyn Harris launched the first Women's Advisory Board, co-chaired by Taunee Besson and Gerry Myers in its first two years. Today, Sharon King, president of numerous nonprofits, including Girls Inc. and the Dallas Women's Foundation and CEO for Dallas (TX) Community Television, chairs the Board.



October, 2002—Peoria, IL—Central Illinois Agency

Susan Rees, the General Agent at the time, created numerous financial educational programs for both her board members and women and girls in the community. Sue Herring, former Director of Libraries for Peoria, is the chair of the Peoria WAB. In conjunction with Bradley University, the WAB has created a daylong financial literacy event for teenage girls titled "Welcome to the Real World."

April, 2003—Bethesda, MD—West Financial Group

Alex West, one of the top women in the MMFG agency family, has a very dynamic group of WAB members who have opened many doors to help women become more financially independent. Board Chair Dr. Faye Coleman is president and CEO of

Westover Consultants, Inc., an international multi-million dollar training, research and evaluation enterprise. Among a number of ongoing programs, the WAB has facilitated WFG's work of offering financial planning to federal employees.

May, 2003—Vienna, VA—Capitol Financial Group

Bob Norman heads the DC area agency based in Vienna, Virginia following a stint in MMFG's corporate office. Board Chair Leia Francisco is the former Director of Fairfax (Virginia) County Office for Women. She has been honored with a number of awards for mentoring and advocacy for women and featured in the Washington Post, Lear's and Cosmopolitan. The WAB has spearheaded the development of a Financial Education Center (FEC), now operational, to bring financial information to women throughout Fairfax County.

September, 2003—Los Angeles, CA—Michel Financial Group

Kim Michel, a top award-winning General Agent convenes a WAB chaired by Dr. Renee Fraser, president and CEO of Fraser Communications. Renee was named one of the "Ten brightest women in advertising in the Southwest" and is immediate past president of the Los Angeles chapter of the National Association of Women Business Owners. In its first year, MFG's WAB focused on *Game Face: What Does A Female Athlete Look Like?* They planned a memorable day for several hundred girls who toured the photo exhibit, listened to motivational female athletes from USC, lunched and received goody bags



September, 2003—Atlanta, GA—Moore Financial Group

Andrew Moore, an award winning General Agent, chose Amy Rudolph, a partner in the prestigious law firm of Sutherland, Asbill and Brennan, LLP, as his WAB chair. Concerned about the high lending rates some Georgians face, MFG's WAB is working to provide seminars to educate the public on usurious lending practices.

July 2004—Philadelphia, PA—First Financial Group

General Agent Harris Fishman heads the agency and works closely with Chair Kyra McGrath. Kyra is vice president of Strategic Projects and General Counsel, WHYY, Inc. She is on the board of the Salvation Army of Greater Philadelphia as well as the Forum of Executive Women and is a mentor in the Girl Scouts' Camp VIP program. The WAB is planning a LifeBridge Day in conjunction with the zoo this fall. LifeBridge, a MassMutual Financial Group program, provides \$1 billion of life insurance nationally to fund education for children of low-income parents insured by the program.

September, 2004—Pittsburgh, PA—Financial Advocates, Inc.

Jon Henderson, past president of General Agents' Association, is at the helm of the Pittsburgh agency. Chair Ann Dugan, Assistant Dean and Executive Director of the University of Pittsburgh, Joseph M. Katz Graduate School of Business Institute for Entrepreneurial Excellence, was named one of the *Pittsburgh Post-Gazette's Top 50 Business Leaders*. The WAB's mission is to combat the "Brain Drain" as more men retire from financial services by educating and attracting women to pursue financial services as a lucrative career.



Kudos

Advisory Link is very proud of our clients, WAB chairs, General Agents sponsoring the Women's Advisory Boards and members. Gerry and Taunee are happy to spotlight just a few of the wonderful women and men who are part of our program. In future issues, we want to recognize you for your successes as well. Please email Gerry at gerry@advisorylink-dfw.com your awards, recognitions, etc., so we can include them in our next Advisory Link Newsletter.

Dr. Faye Coleman, chair of West Financial Group in Bethesda, has received numerous awards during her 20 years as CEO of Westover Consultants, Inc. Her most recent honors include the 2004 Business Women of Color award, presented by the Maryland/District of Columbia Minority Supplier Development Council; the District of Columbia Chamber's Crystal Monument Award for Excellence in Entrepreneurship and the 2005 Enterprising Women of the Year Award presented by *Enterprising Women* magazine.

Harris Fishman, General Agent in Philadelphia, was a Crystal Achievement winner at the GA Conference. His agency was also among the 23 agencies with the highest number of Rising Leaders, as well as the highest number of Successful Achievers.

Tim Flanagan, General Agent in Charlotte, won the Gold Chairman's Trophy in his category at the annual GA Conference. He also won honors as top policy-producing agency (out of all 85 agencies) and was the Disability Product Leader. Tim was also among the 23 agencies receiving both the Rising Leaders and Successful Achievers recognition.

Renee Fraser, chair of Michel Financial Group, was named 2004 Business Owner/CEO of the Year by the *Los Angeles Business Journal*, the U.S. Small Business Administration's Women in Business Advocate of the Year, and the U.S. Small Business Administration's Economic Empowerment award. Additionally, her company, Fraser Communications, received a 2005 Los Angeles ADDY award. Renee's research and marketing efforts for the turn-around of Frederick's of Hollywood was selected as a case study by the Harvard Business School.

Barb Gill, General Agent in Detroit, was a Crystal Achievement winner.

Marilyn Harris, General Agent in Dallas, was among the 23 agencies receiving both the Rising Leaders and Successful Achievers recognition.

Kim Michel, General Agent in Los Angeles, was a Crystal Achievement winner.

Wendy Lopez, a new member of HFG WAB, was named Office Depot's Woman of the Year at their 2005 conference.

Florine Mark, chair of Seymour Gill Financial's WAB in Detroit, recently received the Beta Gamma Sigma Medallion for Entrepreneurship, a national award recognizing individuals who have combined innovative business achievements with service to humanity, and the Neal Shine Lifetime Achievement Award from Operation Able of Michigan. Additionally, Florine is celebrating the publication of her new book, *Talk to the Mirror: Feel Great About Yourself Each and Every Day*.

Andrew Moore, General Agent in Atlanta, was among the 23 agencies receiving both the Rising Leaders and Successful Achievers recognition.

Alex West, General Agent of the West Financial Group in Bethesda, won the Bronze Chairman's Trophy at the annual GA Conference. She was also a Crystal Achievement winner. Alex was the Retirement Services/TPA Alliance leader and was among the 23 agencies receiving both the Rising Leaders and Successful Achievers recognition.

Lynn Yeakel, a member on Harris Fishman's WAB in Philadelphia, was named one of 25 Women of Distinction in the *Philadelphia Business Journal*, an award that chair **Kyra McGrath** had previously received.



The Ten Principles of Successful Networking

By Taunee Besson, CMF

Networking is a means to grow your business, expand your circle of friends and business colleagues, share your expertise with others and create win-win situations. While some people believe networking is a negative process because they equate it with greedy, self-serving behavior, truly great networkers know that it occurs when two or more parties meet for their mutual benefits.

For your networking to result in win-win relationships, keep these ten principles in mind:

1. **Humans are social animals.** It's both natural and necessary for us to connect. Don't make networking more complicated than it needs to be. Trust your instincts
2. **Believe in the basic goodness of your fellow wo/men.** People enjoy giving each other advice and comfort. You know the old saying, "The best way to make a friend is to ask for help." A willingness to be vulnerable builds intimacy.
3. **Put yourself in the other person's shoes.** Approach your meeting anticipating your colleague's needs. Is he willing to see you because he enjoys sharing his expertise? Is he doing a favor for a friend? Does he think you have valuable information? Is he anxious to fill a key position and he's hoping you might be the right candidate? Remember to address his agenda, while pursuing your own.
4. **Confront your catastrophic expectations.** In breaking new ground, do you focus on the worst possible scenario, then assume it will happen? To change your mindset, face your fear head on. Quantify its probability of happening. Then develop a plan to deal with it. You'll be amazed at how defying this demon diminishes its power.
5. **Do some homework before your meeting.** The internet can prove to be a wonderful source of information. Learn about your networking partner's business, career and preferences. Consider what you want to achieve from your conversation. Prepare some intriguing questions that will be fun for your colleague to answer while giving you valuable information.
6. **Expand your horizons.** Look for new places to meet people and develop relationships. Join a professional organization. Get involved in a task force at work. Volunteer for a community activity. Start shooting the breeze with the other parents at your child's soccer games. Get acquainted with your fellow dog walkers.
7. **Be prepared to give before you receive.** Often people join organizations or plan networking lunches assuming they'll automatically be awarded a contract, a job or increased credibility by just being there. Smart networkers know they must contribute before they can expect a return on their investment. How many times have you heard, "The more you put into it, the more you'll get back?" Don't just join a group, get involved, work on a committee or serve on the board.
8. **Keep your network vibrant.** Networks are like gardens: they must be nurtured to grow and prosper. Make regular breakfast or lunch dates with friends. If it's difficult to meet, send them an email, call for a friendly update or drop them a card. Invite them to sit at your table at a professional conference or charitable event.
9. **Thank people for their help.** A thank you note is more than your mother's bread-and-butter letter. It's a strategic communication that solidifies your relationship. So few people bother to write them. If you do, you'll be giving the recipient a gratifying gift of appreciation.
10. **Always remember the Golden Rule.** "Do unto others as you would have them do unto you." Or, in modern parlance, what goes around, comes around. Networking is a two-way street. Practice it with the expectation of benefiting both parties, now and in the future. `



ABOUT US

Advisory Boards and Exec-U-Links

Advisory Boards assist companies in their marketing, sales, recruitment and retention efforts. Their focus can be on changing corporate cultures and creating a more family-friendly workplace, or they can concentrate on making the company's products and services more desirable to targeted markets. The WABs give advice to upper management on issues important to growth and profitability. Additionally, they help businesses become more involved in the communities where they do business.

Internal Exec-U-Link groups are for individuals within a corporation or organization who have common roles, similar issues, departmental conflicts or goals they want to explore beyond the customary work atmosphere. Once selected, the members come together for confidential meetings to access each others' collective expertise, solve mutual challenges and meet with corporate management when appropriate. A professional facilitator and the predetermined agenda ensure that members receive maximum value for their time and dollars. At meetings, members share best practices and insights, develop or critique marketing, operations or other strategic plans, improve relationships with employees and supervisors and encourage out-of-the-box thinking. Internal Exec-U-Links can work effectively with franchisees and a franchisor, cross-departmental executives, rising stars, and numerous other corporate situations. An example of an internal Exec-U-Link was New York Life's group of 12 new agents with one to three years of experience. During its tenure, not a single agent in the group left the organization—a remarkable statistic considering the turnover in the industry.

An external Exec-U-Link group consists of approximately 12 carefully-selected individuals, who serve as a resource for each other in much the same way a business coach or think tank would advise and counsel corporations or top executives. The members are strategic decision makers, dedicated to moving their organization or own business forward through active collaboration. Members are in non-competing industries and are held to the highest standards of confidentiality. See [Building a Business to Connect Executives](#) for examples of external Exec-U-Links.

Building a Business to Connect Executives: How It All Began

As seasoned business owners in a joint venture, Taunee and Gerry consulted on several Women's Advisory Boards (WAB) for large corporate clients. Noting the success of their mission, their passion for what they were doing, and their exceptional working relationship, forming Advisory Link was the next logical step...a great step for both of them. Two of their joint projects laid the foundation for Advisory Link.

- A Women's Advisory Board program for New York Life Insurance Company's corporate and field offices began in March, 1997. Taunee and Gerry formed Women's Advisory Boards in six locations—Dallas, Chicago, Washington DC, Phoenix, Pittsburgh and Sacramento.
- A national Women's Advisory Board for Organizational Alliances assisted ClubCorp in attracting more professional women to their clubs. The initiative drove the transformation of their City Clubs into Business Clubs and formed alliances with national organizations whose members have the same profile as ClubCorp's. The organizations were represented by national presidents, past presidents or national board members, and included: The American Institute of CPAs, Leadership America, National Association for Women Business Owners, National Network of Commercial Real Estate Women, Public Relations Society of America, The Women's Museum, Young Entrepreneurs, Institute of Management Consultants, Society of Human Resource Executives and Meeting Professionals International.

(Continued on Next Page)

Building a Business to Connect Executives (continued)

In June, 2000, Taunee and Gerry founded Advisory Link, Inc. and continued hatching new projects by forging links among well-matched executives forming bonds in exclusive, supportive groups called Exec-U-Links. Contact Gerry or Taunee about membership opportunities and the unique benefits of Exec-U-Links such as these:

- Twelve exceptional women executives, half of whom were in positions that focused on marketing products to women and half who were in HR functions, comprised Advisory Link's first external Exec-U-Link. The **Executive Women's Exec-U-Link** provided ideas, encouragement, solutions and feedback to each other.
- **Women Executive and Business Owner Exec-U-Link** is composed of successful women business owners and top-level female corporate executives. This unique group continues to thrive and enjoys the exchange of best practices, contacts, recommendations and a collective expertise of over 250 years.
- **Women Automotive Dealers** who both own their dealerships and are responsible for day-to-day operations enjoyed the unique opportunity to talk candidly and confidentially with other successful women dealers, a forum unlike anything else in their industry. The group is on hiatus after meeting for several years. However, the members may reconvene in 2005. Women who qualify for the group should contact Gerry Myers if they are interested in membership.
- **International Exec-U-Link** for men and women who specialized in international business. The group was made up of individuals from corporations, entrepreneurs and nonprofit executives.

Introducing Taunee and Gerry For Those Who Don't Know One of Us...



Taunee Besson keeps busy as Chair of the Board of Advisory Link and president of Career Dimensions. She is a nationally recognized authority on career development, and is active in community and professional associations. Additionally, she is a wife, mother and grandmother to one-year old twin boys. Sam, the mighty Maltese, rounds out her family.

Taunee has been a columnist for numerous print and electronic media, including the *Wall Street Journal's* CareerJournal.com (formerly *National Business Employment Weekly*) as well as WorkingWoman.com and oxygen.com. She has authored three editions of *NBEW's Premier Guide to Resumes* and *NBEW's Premier Guide to Cover Letters* and a variety of articles for trade and business journals. Taunee has been quoted many times in *The Wall Street Journal*, *Dallas Morning News*, *Business Week*, *Time*, *Smart Money*, *Rocky Mountain News* and other publications.

She is a director on the International Board of the Association of Career Professionals International, and past president of the organization's USA Board and the Dallas/Fort Worth chapter. An alumna of Leadership Dallas and Leadership America, Taunee has worked on community nonprofit boards and committees for the past 25 years, including Girls Inc., Women's Center of Dallas, Girl Scouts, Dallas Women's Foundation and Mortarboard, among others.

Accolades for her include Professional of the Year in 1994 by the Dallas Chapter of the American Society for Training and Development and Distinguished Citizen, bestowed by Alpha Gamma Delta in 1999. Her *NBEW* columns were selected for the "Ten Best Article Award" in 1990, 1994 and 1997. She has been a Career Management Fellow since 1995.



Gerry Myers is President and CEO of Advisory Link and The Myers Group. In addition to her volunteer activities in both civic and professional associations, Gerry focuses on the women's market and helping corporations better understand the purchasing power of today's women and how to best meet their needs. As a wife, mother and grandmother, Gerry enjoys spending time with her family, including her favorite feline pair.

Gerry has worked nationally and internationally as an author, consultant and professional speaker. Considered an authority in her field, she has written articles for and been featured or quoted in, *WorkingWoman.com*, *American Demographics*, *Broker World*, *Independent Agent*, *The Financial Post*, *The Dallas Business Journal*, *Honolulu Weekly*, *Toronto Star*, *Marketing News*, *Detroit Free Press*, *Christian Science Monitor*, *BrandWeek*, *Automotive News*, *Working Woman*, and numerous other publications. She has been a guest on a variety of radio and TV talk shows. She is the author of *Targeting the New Professional Woman: How to Market and Sell to Today's 57 Million Working Women*.

Gerry is past president of the Dallas/Fort Worth Chapter of the National Association of Women Business Owners and of the D/FW Chapter of the Automotive Women's Network (formerly Women's Automotive Association International). She has served on numerous civic and philanthropic boards that focus on women's and girls' issues, including the advisory boards of Women's Leadership Exchange, Women's Resource Center of the Dallas Metropolitan YWCA, Women's Link, Girls Inc., UNT Department of Marketing & Logistics, and Love for Kids. She is a graduate of Leadership Dallas and Leadership America. Her academic background includes a BS from the University of Texas at Austin and an MBA from the University of North Texas.

Premier Office Space Available

**Enjoy the benefits of an executive suite with
the privacy and prestige of having your own office.**

Advisory Link is looking for an entrepreneurial company to share our office space and equipment. We're in the Concourse Office Park, 6330 LBJ Freeway, Suite 136, between Preston and Hillcrest roads. The available office measures 18.6 x 15. One person may use it or divide it into two good-sized offices or several cubicles. A former tenant held small group seminars there. The rent is **\$560 per month** and includes a furnished reception area and supply room. This is a great deal for this premier North Dallas location.

We also have a furnished conference room to share, which would add \$60 per month to the above rent should you want to utilize it.

Both rooms are wired with regular phone lines, Ethernet network and DSL internet connections. Our new tenant can use Advisory Link's laser and color printers, fax, copier and telephone system, for which s/he will only share maintenance expenses.

If you want centrally located office space without the high costs of an executive suite, send us an email at news@careerdimensions-dfw.com or call 972-233-9019.
