

## Interview with Kyle Gleich

1. What helped you (or your team) succeed in 2020, which was a challenging year?

*KG: Our vision and our natural desire and drive helped us succeed--resiliency and hunger to succeed and serve people in the most unnerving of times. Togetherness as well. We have a unique, close-knit and cohesive team in New Albany, Ohio, as well as in the Central Ohio Agency led by Jared Jenkins.*

2. What actions did you (or your team) take during 2020 that specifically helped you to gain trust, appointments, and new business?

*KG: We took the same actions we always take, which is, we simply took action! We put our clients first, and they know that based on how we treat them. Also, our clients are the drivers of the process. We don't sell products, which is unfortunately what the rest of the entire industry does, as much as we look to build refer-ability and brand credibility through our process and our presence.*

3. Did you conduct business primarily via phone and webinar, or did you meet while socially distancing?

*KG: All. But clients still prefer in-person meetings.*

4. Did you have any challenges, and if yes, how did you overcome that challenge?

*KG: Yes, but humility, strength, honor to your cause and your family, and diligent resiliency, enables you to rise above any challenge, as well to learn from those challenges to prevent repeat mistakes and grow to be a better person and advisor.*

5. Did any of your challenges turn into a positive?

*KG: The cliché answer would be to say, YES, but true growth and development takes time. I have perspective, and I maintain perspective. These sales rankings unfortunately are only intra-company sales figures that are celebrated on a short-term basis. Many people in 2020 had much bigger challenges than I did due to the pandemic, sadly, and experienced loss of jobs, income and entire livelihoods. So, I'm grateful for what I have, which is my overall health; my beautiful wife and kids; a business, career and office in New Albany that I love; and my team with Jen Kauffman, Jared Jenkins, Bobby Brown and Nate Fausnaugh.*

6. Do you have any specific examples of how you succeeded with a specific customer (or team/project)?

*KG: I'm not going to single any particular client out as more or less successful as I look to ensure success at the highest level possible for each personal engagement. And I prefer to use the word client*

over customer because a client is a relationship whereas a customer is a transaction. Each client or prospective individual or family who I encounter gets the same, comprehensive process to genuinely help them and provide them the financial clarity that they need. Through that process, I'm able to **be there** for those clients. Therefore, when something unfortunate happens such as within the first 2-months of 2021 where two of my clients and personal contacts passed away within two weeks of each other, one in his 30s and another in her 50s, I was there to help.