

DELIVERING PROVEN LEARNING EXPERIENCES IN FAST-CHANGING TIMES

Beverly Flaxington, Founder & President, **The Collaborative for Investment Education, Inc.**, talks to Tom Burroughes, Group Editor at *WealthBriefing*, on her organization's successes.

What sets you apart from your peers this year?

Prior to COVID we identified trends in the industry requiring unique delivery of training services in order to accommodate firms large and small, in all geographic locations. To address this need, we began the process of moving proprietary, proven training material to a virtual platform accessible from anywhere, by anyone. In addition, we combined our deep knowledge of human behavior and how people not only learn but make important behavioral changes necessary to be successful in today's competitive world. This allowed us to leapfrog over the training firms who were scrambling to move their material to a virtual delivery. We not only had the delivery platform in place, but the unique underlying material as well.

How have your colleagues contributed towards the success of your organization?

We are fortunate to have a team with decades of experience and success in the financial services industry. While many training firms face pushback from participants with deep experience, the participants in our virtual training sessions year for more because all of our trainers and facilitators are experts who have been in their seats. We are able to facilitate discussions, coach effectively and train on material that advisors and others who have been doing this work for decades find new and complementary to their experiences.

How has your business and business model reacted to the pandemic? Has morale amongst your colleagues held up well? What have you done to bolster their spirits?

We have kept morale high because we enjoy delivering our material and the

virtual world has not changed this. We have modified our approach to be very hands-on with small group sessions, and what we call Mastermind groups and Ask the Expert sessions. This has allowed our team to stay close to our clients and hear the same enthusiasm and excitement from the learners we have always had in person. Our team has stayed connected throughout the pandemic and we are lucky to enjoy and trust one another.

What are you doing to stay on the forefront?

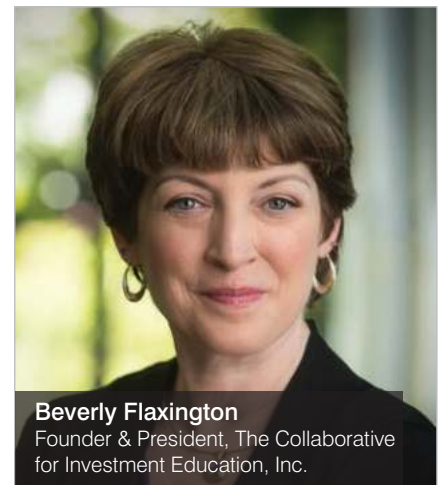
We stay in close connection with our clients to understand how their experiences are changing with market dynamics, competition and internal pressures. We are always customizing the learning experience so that it matches the environment our clients operate within. We continue to obtain new credentials. (Beverly Flaxington became Emotional QuotientTM Certified in 2021.) We stay cutting edge on adult learning and behavioral change techniques in order to ensure our training material has the highest impact.

Have your differentiators become more important to your business? Are they still relevant?

Keeping a focus on the human element and staying abreast of industry challenges and changes continues to differentiate us. After almost every program we receive feedback it is "the best" training the advisor or financial professional has ever attended. We continue to do what we do well – put the focus on the client and ensure they receive the best experience possible by every member of our team.

Whom do you look to for inspiration?

Our clients! We consider ourselves to be part of their team. We work collaboratively with their internal team members and treat every single client as though



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they are our only client. We listen to what they need and incorporate their ideas and concerns into everything we do. They inspire and inform the changes we make.

What do you hope will be the result of receiving this accolade?

We believe we are a well-kept secret in the industry. Clients who work with us stay with us for years, sometimes decades. We hope others who have not been able to enjoy the training we offer will learn about our secret and try us out. We have an amazing track record of success and hope to build upon this in 2022! ■

