

# FocalPoint CASE STUDY

**Jay Akerstein** — *Financial Services Marketing*

## **Profile:**

---

Jay Akerstein is Senior Vice President, and Chief Operating Officer of Asset Marketing Systems, LLC. Formed in 1996, AMS is one of the fastest growing field-marketing organizations in the financial services industry, and provides a complete range of marketing and sales services ranging from lead generation tools and case analysis, to product origination targeted at senior citizens who are seeking intelligent investment opportunities.

## **The Challenge:**

---

Before enrolling in the FocalPoint program, Mr. Akerstein occasionally wrote down his personal and professional goals, but rarely acted on them. He could not account for his daily activities or accomplishments. Furthermore, he failed to delegate tasks to others, instead wasting his valuable time on lesser activities.

## **The Solution:**

---

Module 1: *Gain Power Through Clarity* was critical in helping Mr. Akerstein concentrate on what he wanted to accomplish. The 10 Goal Method applied in Session 10 taught him how to set goals not only for the workplace, but for his personal life as well. Ricardo's Law of Comparative Advantage from Session 24 of Module 2: *Increase Your Effectiveness* helped him focus on what he does best, and by delegating tasks to others, his entire organization is able to work more effectively and more profitably.

## **The Results:**

---

Now Mr. Akerstein writes down both his personal and business goals every morning, which allow him to focus his mind on what he wants to accomplish and forces him to act. Since its 1996 inception, AMS now has 175 employees, and has grown from \$9 million to \$1.7 billion in paid annuity premiums. The company has expanded its market base beyond seniors to include active retirees and baby boomers. One of the goals he is most proud to have reached is his goal of being happily married. Every day for six months he not only wrote down "I am married" but also listed the characteristics of the person he wanted to be with the rest of his life. Mr. Akerstein was introduced to someone that fit those characteristics and 18 months later they were married.

