



Client Case Study: MassMutual Financial Group

Client: MassMutual Financial Group Hawaii serves the state with the wide array of resources offered through Massachusetts Mutual Life Insurance Company, a nationally recognized company founded in 1851 that helps individuals, families, and small business owners with income protection, retirement, and long-term care planning, as well as employee benefits. The Hawaii office is affiliated with Fraser Financial Group in Los Angeles. (www.massmutual.com)

Situation: MassMutual Financial Group Hawaii holds an annual meeting with its more than two dozen independent contractors to plan for the upcoming year. The company's leadership reached out to Cynthia Yamasaki at EEpath™ to serve as the featured speaker for the December 2015 meeting. Specifically, they asked for her assistance in providing strategies on how to best achieve a “growth mindset” (versus a “fixed mindset”) in tackling personal and professional endeavors, with the overall goal of doing what is right for the client.

Execution: Cynthia worked with the general manager of MassMutual Hawaii to best understand the company, its goals, and the needs of the group, as well as integrate several videos that had been selected for the event. She created an EEpath™ Leadership Talk entitled “Winning Ways for Success” that covered:

- Ways to align and achieve objectives for what is most important in a career and in life.
- Five Keys for Excellence as a leader, facilitated so participants can immediately practice tools and concepts.

The talk included handouts for each participant, as well as a thorough description and agenda.

Results: The company was looking for speaker who could add value to the annual meeting in a way that supported its goals and mission of serving clients with proactive quality service as trusted financial professionals. Participants left with a more thorough understanding and appreciation for the “growth mindset” and tools that can help them achieve it on a daily basis.

“It is always helpful to get an outside perspective on your company, since not everyone sees things in the same way. Cynthia provided us with the insights we needed to energize our team for the coming year. Her business sense and extensive coaching background provided us with strategies on strengthening our ‘growth mindset,’ which is exactly what we were looking for.”

– Wayne Tanaka, General Manager, MassMutual Financial Group Hawaii