

## EPISODE SUMMARY:

In this episode of the Rainmaker Podcast, host Gui Costin sits down with Joe Grogan, Head of Distribution for the Americas at WisdomTree, for an energizing conversation on leadership, sales strategy, culture, and the power of treating people like owners. With over 25 years of experience at firms like Fidelity and State Street, Joe shares how his humble beginnings and early exposure to sales instilled a relentless drive that continues to shape his leadership style.

Joe's journey to WisdomTree began with a cold call from a recruiter and evolved into a long-standing leadership role at one of the most innovative ETF providers in the industry. He fell in love with WisdomTree's entrepreneurial culture and commitment to transparency, client outcomes, and constant innovation. Today, he leads a 50-person distribution team across the U.S. and Latin America, focused on providing consultative value to financial advisors rather than just pushing products.

Grogan walks listeners through his approach to team structure and culture, emphasizing the importance of clear expectations, open communication, and professional development. His team spans national accounts, wires, RIAs, and enterprise channels, with a strong emphasis on career pathing from analyst roles to field sales. Weekly calls, one-on-ones, and a highly transparent performance tracking system help drive accountability while fostering healthy competition.

Joe also discusses how CRM and AI tools have transformed his team's efficiency. From automated meeting notes to engagement-based compensation tracking, WisdomTree leverages data to reduce administrative burden and keep salespeople focused on high-impact client interactions. He views CRM entries not as micromanagement but as "gold bars" that unlock insights and create better investor experiences.

Leadership, for Joe, is about servant mindset, vulnerability, and long-term retention. He believes in empowering his team, maintaining low turnover through trust and autonomy, and treating teammates like the professionals they are. Rather than managing activity for its own sake, Joe rewards outcomes and teaches his team to think like owners of their own territory.

His advice to young professionals? Nail your current role. Master the fundamentals. Don't worry about the next job—it will come if you focus on being excellent where you are. This episode is packed with tactical insight, cultural wisdom, and authentic leadership takeaways from one of the most respected distribution leaders in the business.