

## Get Results

**There are a number of ways to communicate with your clients and prospects; here are some tips to help you be more effective**

by Teresa Easler



**T**oday, people are overwhelmed by the amount of information that is available to them. Whether via the Internet, personal contact or direct mail pieces, it is almost a certainty that your clients and prospects receive more information than they need — or want. With this in mind, the problem for you becomes how to ensure your clients and prospects are getting the messages you want to communicate to them, no matter how you choose to disseminate the information.

It is important to remember that whenever you are engaged in any kind of interaction with another person, you're communicating. To take full advantage of all the different opportunities you have to share your message, begin consciously thinking about what results you'd like to start seeing from each communication situation. Once you understand the objectives you

would like to achieve, crafting a message that is powerful and focused is less difficult.

### **The audience**

If you don't know who it is you are communicating with, you won't be able to connect with the person you are addressing. This might sound obvious, but it's critical for advisors to understand who they are communicating with before making a phone call or sending a brochure, for example.

Why? Because there are two questions a client or prospect is going to ask you when you're finished telling them about the services and products you offer, and neither has anything to do with you: What's in it for me? Why do I care? If you don't know who your audience is, you aren't going to be able to answer these questions for them.

When communicating, people like to feel they are making a connection. They want to feel as if they're not alone. Every time you approach a prospect or a client, you have the opportunity to make them feel like somebody is looking out for their best interests.

### Something to remember

It also is a good idea to think about what you want people to remember after you are finished talking to them. Often, we want to tell others everything we know, making it hard for them to distinguish what is important and useful to their situation and what they can disregard.

To keep your clients and prospects focused on what you want them to think about, limit your discussion to three main points. Be clear and concise in your message because, when you are, you make it easy for people to say "yes." Conversely, if clients and prospects are unsure of what you are talking about, the natural instinct will be to want more time to think about it or flatly refuse.

### Make them feel

Though there is probably no doubt that you want your clients to *think* about the benefits of having a sound financial plan, it is also to your advantage to consider how you would like them to *feel* after meeting you. It isn't unusual for people to make decisions based on their feelings, using the facts to justify the particular action they choose to take.

The next time you are giving a presentation, be clear about what emotions you want to elicit from your audience, and then build your discussion around these feelings. Remember, you aren't going to connect with a client or prospect

### Fast Fact

The amount of information in the world is growing at a rate of three to five times a year. To get an idea of how much information is out there, and why it is so important for financial services professionals to ensure their message is clear, concise and targeted, consider this: The Sunday edition of *The New York Times* contains more information than the average person in the 18th century saw in his or her entire life.

through information; you are going to connect through emotion, and that is where the decisions will be made.

### Take action

You — not your clients or prospects — are responsible for sustaining the momentum of the meeting, even after the discussion has ended. One way to accomplish this is to give your clients and prospects a course of action to follow. Don't hesitate to be direct, telling them, for example: "Let's meet next Tuesday to review what we've discussed, say, 6 p.m. at my office?"

If you are concerned that taking such a direct approach will sound too pushy or aggressive, remember that your clients and prospects always have the option of declining or renegotiating the timeframe you've set for them.

### Creating value

Whether or not your clients and prospects take the action you've outlined for them, you want them to walk away from the discussion and say, "Wow, that was time well spent." Remember, as well, that value isn't only about information; it's also about providing an experience. When people are engaged with you, they may be learning something new, or they might discover some new tools that can help them move their lives forward. More simply, they might be given hope that they didn't have before.

The lesson for you: Every time you communicate, you have the opportunity to create value for someone.

### Be yourself

Examining what you do for your clients while communicating — as well as the results you would like to achieve — is important. Just as critical, however, is considering *who* you need to be when meeting with clients and prospects.

Though I am not suggesting that you don't know who you are, I would like to encourage you to think about expanding your perception of yourself, especially when communicating with your clients. Think about the person you really are — your authentic you — and make sure your clients and prospects see this part of you. When you do, something magical happens: Your clients and prospects will know they are working with a real person. (See "Success Story" on page 22 for more information.) **RTT**

### Straight From the Sessions

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