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Our latest commentary to help you elevate the success of your practice

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Be intentional about which networking events make it onto your calendar this summer as they are an important aspect of new client attraction. How can you make first encounters count while ensuring your attendance is perceived as genuine rather than superficial?

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[The Multiplier Effect of Isms](#)

By: *David Richman* | *May 24, 2023*

A well-crafted ism is a timeless, pithy sound bite that connects the dots to the advice you provide. It can help you make [first encounters count](#), generate more meetings and answer the inevitable "[Why us?](#)" in first meetings. What's more, isms have a "multiplier effect," helping you capture referable moments by tapping into human nature.

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[Answering the, 'Why Us?,' in First Meetings](#)

By: *David Richman* | *May 18, 2023*

Every first meeting with a prospective client has a pivotal "why us" moment after you spend time asking thoughtful discovery questions. It's the moment you inspire them to overcome their status quo bias and choose you as their advisor.

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[A Better Answer to 'What Are You Telling Clients Today?'](#)

By: *David Richman* | *May 11, 2023*

When it comes to attracting clients, it is better to be discovered than announced. Let prospective clients discover you socially, instead of cold calling them.

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[Should You Let Sleeping Ostriches Lie?](#)

By: David Richman | April 19, 2023

Your clients likely have varying coping styles that especially manifest during turbulent markets. At the risk of over-simplification, there are three classic coping styles—[the dragon, the owl and the ostrich](#). No matter how vigilant you have been in preparing your clients, their coping styles are likely to surface when market volatility spikes.

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[Prospecting Calls: Reframe Your Purpose, Reap the Benefits](#)

By: David Richman | April 5, 2023

What is your purpose when you call a prospect? If you answered "to get a meeting," we would like to offer a mindset shift to help you reframe your purpose.

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By: David Richman | March 23, 2023

When a black swan event appears and rocks markets, like the latest banking events, your clients want to hear from you. Actually, they yearn to hear from you.

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[An Antidote for Overconfidence and Binary Bias](#)

By: David Richman | March 13, 2023

What drives prospective clients' inertia? For years, I have been suggesting the answer is status quo bias or complacency—the classic "all set" objection. Let's step back and "think again" as there may be other biases at play.

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By: [David Richman](#) | [March 9, 2023](#)

Winning teams are teams in harmony. They form when a culture and construct optimizes the synergistic potential of all team members.

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