

Coach's Corner

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Your First Question to Clients in 2024

By: David Richman | January 10, 2024

With the holidays behind us, now is the perfect time to reach out to both your existing and prospective clients with the following question: "What is the **one thing** you'd like to accomplish in the year ahead, and how can I help?"

Here is some suggested language to tee up that question in your conversations with clients. This is meant as a suggestion only, not a script. Bring your own experience and vocabulary to it.

"My appreciation for the power of a new year continues to evolve, which has led me to start asking clients: 'What's the one thing you'd like to accomplish in the year ahead, and how can I help?' One client responded with a desire to take a fresh lens to their estate plan, another wanted to apply 'what if' scenarios to their financial plan, and another wanted to take a more strategic approach to philanthropy. What is *your* one thing?"

Let's examine the subtext and intentionality behind this phrasing:

"My appreciation for the power of a new year continues to evolve"

- This infers that you're always professionally evolving and growing.
- It also addresses why you haven't asked them this question before.

"...which has led me to start asking clients..."

- The use of the word clients, even for prospective clients, is quite purposeful. If you start treating them as clients, they may start treating you as their advisor.
- Framing the question as "what's the one thing" keeps it open-ended and hopefully yields something significant even if it's never been verbalized.

"One client responded with..."

- Providing examples may stir their imagination.
- This is an important sentence to customize based upon the clients you serve and aspire to serve.

For prospective clients, this question is more significant than a "check in" or "how were your holidays" call. It gives them a taste of what it would feel like to be your client and deepen the conversation, hopefully serving as kindling for next steps.

For existing clients, it can start the year on strong footing, even where your connectivity may have not been as significant as you would have liked in the recent past.

Bottom line: The turn of the calendar is a propitious moment to be a catalyst for deeper planning with clients and to ignite the passions of prospective clients.

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