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Chasing Positivity® > The Charismatic Advisor® in Conversation

LEARN | Engage clients based on their coping style

Life events or market volatility can disrupt a client's sense of financial security. When you understand clients' specific coping styles, you can adjust your approach to help them manage uncomfortable emotions, increase their personal control and chase positivity.

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Two common client coping styles



Dragon

- Places others on the defensive
- Prone to expressing anger and sarcasm
- Displays a confrontational demeanor, sometimes in a muted fashion

Dragons can make you feel anxious if you have not yet figured out how best to manage their combative behaviors, lessening the likelihood you can help minimize their inertia.

[Strategies to engage a dragon](#) 🔍

OR



Ostrich

- Uses denial to deal with financial anxiety
- May not open financial statements or check on his/her portfolios or extended periods
- Unlikely to contact you when his/her anxiety is high
- Likely to put off responding to your calls or emails

A lack of contact does not mean the client isn't worried about his/her portfolio. Taking such a stance will only intensify client frustration and anxiety.

[Strategies to engage an ostrich](#) 🔍



Bottom Line

By becoming a source of strength, not a silent partner, you can help dragons and ostriches cope with financial uncertainty, reinforce resilience in your clients and ensure an ongoing productive relationship with them.

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What's next?

If you're interested in digging deeper into this topic, you can go to the next resource. If not, we recommend continuing to the next subtopic.



Getting started



 WATCH 3 Dynamics to Overcome Client Inertia NEW 1 minutes →
 LISTEN An approach to learning the 3 Dynamics 6 minutes →
 LEARN A road map to master the 3 Dynamics 5 minutes →
 LEARN Prepare for success 3 minutes →



Communicating empathically



 WATCH See the World Through Clients' Eyes NEW 1 minutes →
 LISTEN Practice leaving yourself behind 8 minutes →
 LEARN Lead with genuine interest 5 minutes →
 LEARN Three strategies to understand purpose 5 minutes →
 PLAN Become more empathic 15 minutes →



Collaborating consciously



	WATCH Engage Clients in the Decision-Making Process	NEW	1 minutes	→
	LISTEN Put away the black robe		5 minutes	→
	LISTEN Beware of painting with a broad brush		5 minutes	→
	LISTEN Don't take the bait		5 minutes	→
	LEARN Engage clients based on their coping style		5 minutes	→
	PLAN Become a better collaborator		15 minutes	→



Inspiring action



	WATCH Motivate Clients to Move Forward	NEW	1 minutes	→
	LISTEN A proven approach to increase engagement		10 minutes	→
	LISTEN Align by deploying the joining technique		11 minutes	→
	LEARN Words and phrases to inspire action		5 minutes	→
	PLAN Inspire action in others		15 minutes	→



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