Attracting Clients | Chasing Positivity

Pause Your Agenda. Turn on Agendaless Listening.

By: David Richman | November 27, 2023

Year-end is an important time to hone your agendaless listening. People may be more busy or stressed than usual—perhaps in part due to recent global events—and the best way to meaningfully help someone during these times is to slow down your own thoughts and actively listen. So, drop your agenda and learn what matters most to existing and prospective clients right now. Here's how.

Ask Great Questions

The fuel for great listening starts with asking the right questions and continues by asking appropriate follow-up questions to move the conversation toward the next level of understanding in order to provide full balance sheet advice.

- "How are you faring in today's confusing financial environment?"
- "Given recent market volatility, would you like to take this moment to reconsider your risk tolerance?"
- "Are you open to reviewing your financial plans in light of today's interest rate environment?"

Go Beyond Words

As your clients talk, listen carefully. Go beyond their words—their "text "—and notice their "subtext"—the meaning behind their words. Pay careful attention to their facial expressions, body language and tone of voice. Often, that is where deeper truths lie.

Dive Deeper

Formulate more questions to ask. Consider replicating a doctor's method by saying:

- "Is there anything else?"
- "That's interesting. Please tell me more."
- "What I hear you saying is ___. Is that correct?"

Once they understand that you are genuinely interested, you might want to say something such as, "The reason for my questions is to better understand your perspective before offering my thoughts."

Bottom Line: To fully hear and understand clients and prospects, you need to do more than practice the power of the pause. You need to pause your agenda.

> "Drop your agenda and learn what matters most to existing and prospective clients right now."

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