

Practical messages intended to help you elevate the success of your practice.

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Be careful what you ask for

A typical ask that unfolds during role-plays in our prospecting workshop is, "What if we schedule a time to get together to further discuss that?"

It is understandable that you believe an in-person meeting is more likely to help you convert a prospective client into a client. Nonetheless, given where we are with COVID-19, is this a smart ask?

In a recent survey from the American Psychological Association as part of a program called "Stress in America," almost half of the respondents (48%) said they were "uneasy" about returning to in-person interactions once the pandemic is over.

This unease has significant implications. If you ask for an in-person meeting, there is a good chance your prospective client may balk at saying yes. Perhaps try modifying the ask to:

"It would be great to explore this conversation further. What next steps feel most comfortable to you? Shall we schedule a follow-up call, a video conference or would you prefer a socially distanced face-to-face meeting?"

Bottom line: Leave yourself behind when discussing next steps with prospective clients.

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Picture
of

David Richman
National Director
Eaton Vance Advisor
Institute

"If you ask for an in-person meeting, there is a good chance your prospective client may balk at saying yes."



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