

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

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To lead or not to lead?

"If there is one thing you think you could improve upon in prospecting calls, what would it be?" This is a question we ask advisors to consider prior to starting our workshop "The 'NEW' Art of Prospecting." Here is a jewel of a response:

"Let the conversation go where it needs to go — and have the confidence that wherever the conversation goes, I can handle it and continue moving it forward. Versus always having a mental agenda and set outcome."

We explored a fantastic role-play with this advisor. In the first iteration, she went down the singular path of talking about investments with limited success. Next, she worked at staying open and letting the conversation "go where it needs to go." To keep from steering the conversation toward an "ask," she continued with genuine follow-up questions, which led to learning about the client's lending need.

After the role-play, we discussed a metaphor from the world of dance. If you have ever taken a waltz or ballroom dance lesson, you likely are familiar with the concept of lead and follow. Many advisors think they need to be in control, they need to "lead."

Consider for a moment: What might happen if you let the prospect take the lead and you follow? This was precisely how the advisor proceeded as she allowed the conversation to "go where it needs to go."

Bottom line: Magical conversations can occur when you let go of your agenda (leading) and follow.

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David Richman
National Director
Eaton Vance Advisor
Institute

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