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

LISTEN | An approach to learning the ***3 Dynamics***	6 minutes	→
WATCH | Why the ***3 Dynamics*** matter	5 minutes	→
LEARN | A road map to master the ***3 Dynamics***	5 minutes	→
LEARN | Prepare for success	3 minutes	→

Communicating empathically

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

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 →

WATCH | Why intentionality matters — 6 minutes →

LEARN | Engage clients based on their coping style — 5 minutes →

PLAN | Become a better collaborator — 15 minutes →

Inspiring action

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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