Magical client meetings every time!

Your Essential Checklist

Are you a financial planner or adviser?

Is your goal to conduct magical, high-impact client meetings that deliver exceptional value every single time?

Discover these 10 essential keys to magical client meetings!

Report by John Dashfield

Client-centred
ADVISERS

Your client meetings are where the rubber hits the road

They are when you get to create exceptional value for your clients. Why is this important now more than ever?

Because colossal changes are happening in way professional services are delivered. Routine tasks are becoming automated and there is increasing downward pressure on fees and charges. Clients put emphasis on greater value for money.

What does this mean for you as a Financial Adviser?

The role of a financial professional in a client's life is shifting: it lies no longer in the transaction but in the conversations, the depth of your relationship and, most importantly, the positive changes you create and enact in your clients' lives.

Your role now encompasses being a brilliant listener, sounding board, coach, mentor, catalyst, guide and teacher all at once. The fact that you know what you are talking about and will give sound financial advice is simply a given, not the selling point.

How magical are your client meetings?

Conducting mundane, uninspiring, product-centred client meetings will ruin your business.

People would rather deal with a machine than sit through all too familiar, and most certainly boring, product lead conversations full of industry jargon.

Magical client meetings are client-centred, revelatory, inspiring, enjoyable, revealing, extraordinary, meaningful, sometimes challenging and ... all too rare.

What is in it for you to create magical client meetings every single time you may ask?

Here are just some of the benefits:

- ✓ Creating better client outcomes
- ✓ Winning more business
- ✓ Building greater prosperity
- ✓ Locking out the competition
- ✓ Receiving more introductions
- ✓ Future proofing your business
- ✓ Far greater job satisfaction and personal fulfilment

A new and refreshing approach

I built and ran my own financial advisory and planning practice for almost fifteen years. In 2004 I founded – and continue to operate – a thriving coaching practice working with financial professionals.

I noticed that the conventional approach to better client meetings – adding more tools, techniques, processes – was not, in fact, of much assistance to many people.

What I ultimately realised was that the more thinking you do, the less well you perform.

So, the foundation of my approach is about getting increasingly better results by doing less.

It seems counter-intuitive until you try it!

Chartered Financial Planner, Geoff Buckland shares his experience:

"John shares a life-changing understanding in a way that is engaging, thought provoking and makes ultimate sense. I found that by serving my clients, truly listening with a more open and relaxed mind, by genuinely wanting to help not to sell, lead to much more insightful conversations and stronger, more enjoyable relationships. As a consequence, my business has flourished."

What are my 10 keys to magical client meetings every time?

Whether you are conducting a first meeting, discovery meeting, presentation meeting or review meeting you can massively improve the impact and quality you are currently having.

Check yourself against these 10 essential keys using the 1 – 10 scale and then select your next steps.

Key number 1

Be fully present

In 1980 the average attention span of a person was around 20 minutes. Today, it is just 7 seconds!

Renowned scientist and author of 'The Biology of Belief', Bruce Lipton, discovered that, on average, people spend 5% or less of their time being present.

So, what are we doing for 95% or more of our lives?

We are lost in thought, often ruminating about our past or worrying about our future. For many people this has become an ingrained, unconscious habit.

Does this improve your client meetings? NO! It does precisely the opposite.

Genuine presence is a very rare quality. Yet a high quality of presence is, in and of itself, transformational. It immediately differentiates you from others in your industry. When you are fully present you are naturally more curious, aware, responsive, attractive and engaging, and this is what clients are seeking.

I have a high quality of presence in all of my client meetings.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 2

Ensure your client is fully present

The great Alan Watts said, “No valid plans for the future can be made by those who have no capacity for living now.”

The quality of presence that your client brings is similarly paramount to magical meetings.

It is essential that they have a clear mind, connect with what matters most to them and do their best thinking.

Yet many of your clients will come into a meeting with a distracted, busy mind. For example, they may be taking time out of a busy day, they might be worried about their finances or anxious about what you might tell them in the meeting.

So, before proceeding, your very first job is to ensure your client is present, settled and comfortable.

I always ensure my client is present and settled into all of our meetings.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 3

Setting a direction

Someone I know shared with me that they once wanted to engage the services of a financial planner. At their first (and last!) meeting, the planner almost immediately launched into a monologue about the differences between active and passive investing.

You could call this an 'adviser-centred' agenda.

It is both important and powerful to set a client-centred direction right from the start of your meetings. This builds immediate trust by communicating to your client that the meetings are all about them and their needs.

How do you accomplish this?

One of the most effective ways is by asking client-centred questions from the get-go. For instance, at the beginning of a meeting you could ask:

"What will make this meeting a brilliant use of your time?"

By asking this type of question and listening to your client's response, you are respecting their time, acknowledging their reasons for being there and beginning to understand their priorities.

I am mindful to set a direction for all of my client meetings.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

PS. If you want to expand your range of powerful questions you can ask your clients check out the 'Financial Planning Power Questions' card deck by **CLICKING HERE**.

Key number 4

Focus on the big picture first

You are no doubt familiar with the saying “Can’t see the wood for the trees”. A client can easily feel overwhelmed if a conversation becomes too detailed too quickly because they begin to lose sight of the bigger “Why?”

Yet this is a mistake that many financial planners continue to make.

How do you avoid this?

Explore your client’s values and create emotional engagement first. This creates context so that if and when you need to get more detailed, they are already in a receptive and open state of mind.

I engage my clients in their ‘big picture’ before getting into detail.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 5

People make decisions emotionally, not logically

It is crucial to understand that the difference between dull, mundane, boring meetings and powerful, inspiring, potentially life-changing meetings ultimately lies in the level of emotional engagement your client experiences.

This is because we do not make decisions using left-brained logic alone. We make decisions emotionally and then justify them through logic and reason (also known as confirmation bias).

The training to become a qualified financial professional is mostly left-brained, memory-based and logical. Unless you are conscious of this pitfall, it will be very easy for you to talk straight from your intellect to your client's instead of engaging on an emotional level first. This will make any meetings you have hard work and unenjoyable for your client.

I engage my clients emotionally, not just logically.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Client-centred

Key number 6

Listen more, talk less

Many professionals talk far too much, even though they think they are good listeners. They dominate conversations and believe this is in the best interest of their client.

Remember that whenever you are talking, you are not discovering anything new about your client. Do you think your client is going to think, “Wow, I am so glad my financial adviser talks so much! I feel like they really understand me now”?

Of course not!

Famous psychologist William James observed, “The deepest craving of human nature is the need to be appreciated”.

I am an exceptional listener and tend to listen far more than I talk.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 7

Drop all thoughts of you

“The worst thing you can think about when you’re working is yourself.” Agnes Martin

When we carry our own perceived needs into a meeting, it contaminates our relationships and negatively impacts the tone and atmosphere.

Thinking we need someone’s business, need their approval or need to be liked are all signs of our own insecurity.

The serious professional will not allow themselves to go down that path. Their client is always the complete focus of their attention, which is why they are a ‘Trusted Adviser’ in the eyes of their client.

I am always 100% focused upon the needs and wants of my client.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 8

Allow space for insights

The greatest value your client could possibly extract from their relationship with you is their own insights, revelations and epiphanies.

This happens through reflection. So, pay attention to your client and notice when they get quiet and reflective. Do not be tempted to interrupt just because you begin to feel awkward or uncomfortable with silence.

Your client will let you know verbally or non-verbally when they are ready to resume your conversation.

I am aware of when my client gets reflective, and I allow space and time for them to think.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 9

Be guided by your intuition

If your meeting processes and procedures become more important than responding to your client in the moment, it can come across as controlling and will lower the tone.

The most impactful communication happens in real time. It is natural, flowing and heartfelt and not strictly pre-planned.

By all means, please do plan your meetings. But once you are at the meeting your plan is not as important as being present and allowing your intuition to guide you. This will often have a dramatically positive impact on the quality of your work and interactions.

I listen to my intuition and allow this to guide me in my client interactions.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

Key number 10

Make agreements, avoid expectations

Your clients and potential clients are looking for leadership.

Far too many meetings are left with the people involved, both adviser and client, leaving with unfulfilled expectations. This can include expectations about what will happen next, who will do what and when it will be done.

Expectations lead to disappointment, frustration and tension. Why? Just think back to a time when your expectations were not met and how you felt. People often do not live up to our expectations of them. We often do not even live up to our own expectations! It creates unnecessary worry and conflict.

Instead, make clearly communicated agreements. Agreements are creative, powerful and people keep them.

I always make clear agreements with myself and others and avoid creating expectations.

1 2 3 4 5 6 7 8 9 10

What one change or improvement can I make to improve this further?

What to do next

Now that you have read through the '10 keys to magical client meetings, every time', you will have had an opportunity to reflect upon your current level of each key.

If you checked yourself against each key and added ideas about next steps, well done!

If you haven't yet done so, please go back and do this as information without action is just, well, information!

Now add up your score:

1. My score	_________	Be fully present
2. My score	_________	Ensure your client is fully present
3. My score	_________	Setting a direction
4. My score	_________	Focusing on the big picture first
5. My score	_________	People make decisions emotionally, not logically
6. My score	_________	Listen more, talk less
7. My score	_________	Drop all thoughts of you
8. My score	_________	Allow space for insights
9. My score	_________	Be guided by your intuition
10. My score	_________	Make agreements, avoid expectations

My Total _________

Your score

You may have scored, low, high or anywhere in between. Whatever your score, it is not designed to be a judgement of you.

What matters far more is that you are now paying attention to the most important factors that influence your work and you are increasingly capable of creating value for your clients. After all, what you pay attention to expands.

Depending on your score there are recommended resources with which you can engage.

1. If score is below 30%:

I highly recommend that you read **'The Client-centred Financial Adviser'**.
This book shares a new and fundamentally different approach to client relationships. It will provide you with lots of examples and context, so it is highly practical, not theoretical. I also recommend you read Michael Neill's book 'The Inside Out Revolution'.

2. If your score is between 30% and 70%:

I recommend that you read the two books mentioned above.

In addition, please consider joining us at our next 'Client Engagement Masterclass'. Please email **john@clientcentredadvisers.com** for more details.

If you are looking to accelerate your progress, then 'The adviser 1-2-1 transformational coaching programme' could be an option for you.
Click here for more information and to begin an enquiry.

3. If your score is above 70%:

What leads to high performance and increasing happiness is both widely overlooked and misunderstood. What if it were easier and simpler than is often portrayed?

If you want to continue to get better results, whilst doing less, you will find the already mentioned resources refreshingly different.

You may also benefit from my **'business mentoring programme'** and/or the **'The 3-day intensive immersion retreat'**. Click on the links for more information and to begin an enquiry.

P.S. Here is a special bonus gift. Whatever your score, I highly recommend the audio 'Expectations vs. Agreements' by the brilliant Steve Chandler. I have Steve's permission to share this with you. Please do not miss this opportunity because this alone could make a huge difference to your business. **Please click here to download.**