

1. MY AGENDA – MY BIAS

Whether discussing sports, events, or relationships people often have an agenda. People often have a motive. Everyone has ‘a bias’. In an effort to be forthright, and set the tone of expectation, we believe it vital to quickly disclose our agenda, motivation and bias.

Our Goal is to Serve – This is How We Begin Every New Interview

Here is a story of Mr. and Mrs. Griffin, who were referred to me by their neighbor, Sheila. Here’s what I say shortly after we’ve said hello:

Mr. and Mrs. Griffin, I believe everyone has a bias. I want to share with you what my bias is: My bias is that you would have an experience meeting and working with me that would exceed your expectation so much that you will go back to Sheila, the one who referred you, and thank her for referring you to me. Whether we have any reason to do business together financially or not, my bias is that your experience would be a positive reflection on your relationship with Sheila, and you would be grateful she referred you to our office.

So, if I do or say anything during any of the time we spend together that rubs you the wrong way or doesn’t seem quite right, I want you to stop me immediately and make me aware of it. After we have spoken I will ask you how this process has gone for you. It is my intention, that you have a great experience and are enlightened, affirmed, and encouraged by our time together. If you feel like you are ‘all set’ financially, it is my goal to prove you correct.

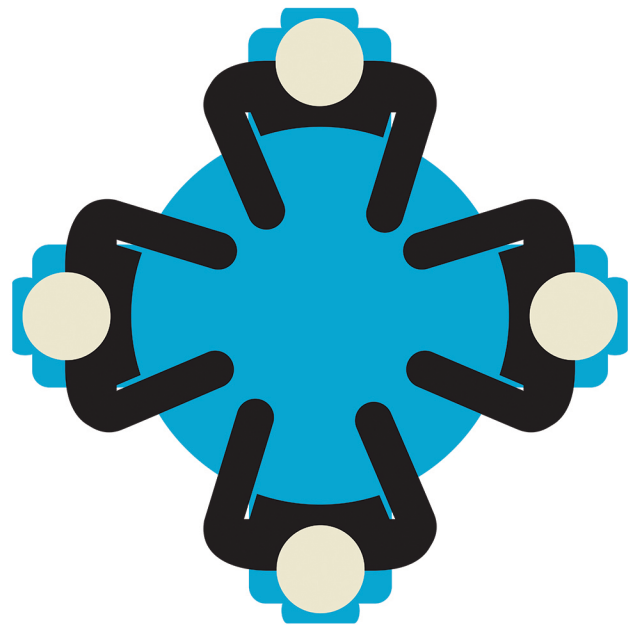


Beginning the meeting this way has a multiplicity effect. Here are four of the most significant benefits:

1. Not only do we set the expectation that we will have served our clients well, but we are having them serve us by giving feedback that is vitally important to serving others well.
2. This introduction completely shifts the energy in the room. Instead of savers coming in thinking they are going to “kick the tires” and see what we have to offer, we are able to talk to them in a way that fully engages forthright conversation.
3. Knowing we want them to benefit from our time together, they will likely feel more comfortable giving more information. That is indeed the goal—for them to benefit from their meeting with us and to get their expectations met. The only way for that to happen is for them to fully engage. The only way for them to fully engage is for us to create an atmosphere of serving. They must know we are there to benefit them, first and foremost.
4. When sitting with clients for the first time, this conversation shifts their perspective so they feel that we are sitting on the same side of the table with them and that we are truly there to listen well and serve them well.

We go out of our way to create an experience that exceeds our clients’ expectation. Not with fancy office wallpaper, gifts, extravagant dinners, or hosting of epic parties, we simply put every bit of effort and diligence into answering questions, knowing our clients, utilizing the best financial tools, and serving beyond expectation.

The goal of our team is to enlighten and inspire awareness of what is possible. Every giant step forward starts with awareness and vision and thinking differently.



Anyone we meet should expect to experience the following:

- Greater effectivity in results from your retirement assets (if possible)
- Greater efficiency in cost and true diversification (if possible)
- Greater enjoyment – Freedom of use and confidence in your future (definitely!)

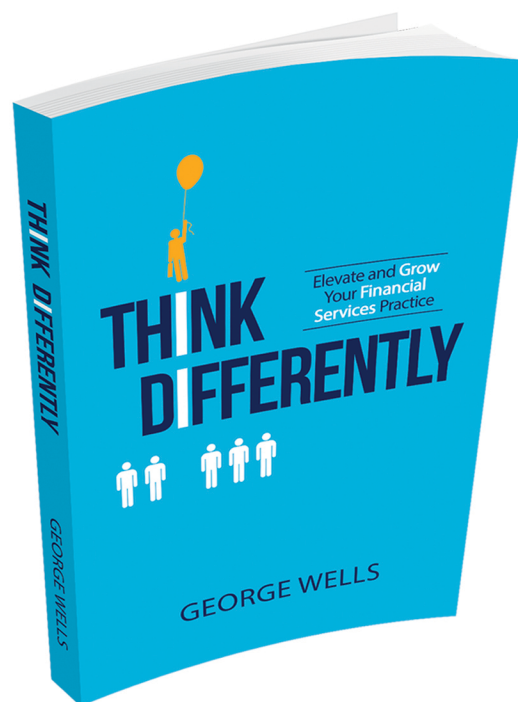
Traditional Predatory Sales

I observe traditional sales as a “predator vs. prey” model. Too often, financial advisors are taught to attempt to “drive a wedge” between a saver and his or her current advisor or financial plan and attempt to convince prospects that their own products are the best without taking time or interest to determine what is most important to the clients and what is good about their current plan. This results in a big missed opportunity.

Sell, sell, sell...ABC — *Always Be Closing*. We’ve seen countless movies highlighting the behind-the-scenes hustle of manipulative and borderline-deceitful techniques rumored to be taught to financial reps to ‘sell products’.

And you know what? It doesn’t have to be that way!

If you’re a client reading this, it’s a great opportunity to “look behind the scenes” and see the motivations, methods, and techniques our elite financial professionals use.



Serving vs. Helping

With all the chaos and complexity in the financial markets, it’s more important than ever to understand our clients to serve them better.

We prefer to use the word “serve” as opposed to “help.” The concept of “helping” assumes that one person is in a subordinate position to another. But “serving” assumes that both people have equal status. The advisor and the client are on the same side of the table. This creates a partnership in which both parties are working together toward the same goals. Your professional skills will be elevated and valued because your methods foster insight, empathy, and advocacy. How can you be someone’s advocate if you do not know them?

This is opposite what has been typical over the years in the financial service business—the information-harboring advisor sitting behind a mahogany desk, dictating recommendations in a somewhat condescending “father knows best” tone. No one ever liked this approach, and in the age we live in today, few savers tolerate it. The most sought-after clients want to be served by a professional they can relate to who makes financial matters simple and clearly cares about their best interest. In summary, we serve well.



Serving well is living well. As you are giving, you will be receiving. What you have, achieve, and enjoy is a multiplied measure of what you give.



— George Wells

We experience the adage, “What you have, achieve, and enjoy is a multiplied measure of what you give.” This does not make sense mathematically. How could one give up something yet receive a multiplication in return? It does not make sense logically, yet naturally it works.

Think of a time when you were young and some teacher, mentor, or other caring elder took time to invest in you. That person may have noticed something positive about you that others overlooked. Or maybe he or she encouraged you or taught you something you never forgot.



What often creates the impact is the fact that someone saw you, heard you, and did something to leave a positive impact that you never forgot. With our process, we are creating those “moments of impact” in every meeting. We are leveraging our role as highly skilled financial professionals with a higher level of impact. Being known and experienced as a lifelong, key person of impact financially. Ideally, our clients look back on the day they were referred to us as a key transition in their saving careers.

We are excited to facilitate the journey of mutual discovery as we answer questions, and give feedback on what retirees have and how it is aligned to give them what they expect over the long haul.

Assignment:



1. Do you try to prove that someone new you meet is in fact 'All Set' financially?
2. Do you highlight what is good about their current plan?
3. Do you ever disparage your competition?
4. Do you insist on facilitating 'mutual discovery' of your clients' needs and preferences, or do you have a tendency to talk about the great products you represent?
5. Do your clients feel listened to?
6. Do your clients feel understood?
7. Do you ask everyone you meet for feedback so the next prospect you are referred to can have a better experience with you and your office?



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