

OVERVIEW

Starting the conversation. To some it comes naturally but for others it's something that requires constant work and energy to achieve. We all engage in numerous conversations every day, but it's the intentional, pointed, outcome driven conversation that requires a unique skillset that requires practice, repetition, and skill. Here's some tips on how to drive the intentional conversation with clients, or more importantly, prospective clients:

CONVERSATION TIPS



1

S.O.F.T.E.N

The non-verbal first impression. **S**mile, **O**pen posture, **F**orward lean, **T**ouch by shaking, **E**ye contact, **N**od when the other person talks. This technique shows you're attentive and engaged.

2

COMPLIMENT

Complimenting the other individual is always a good transition and entry into a more serious conversation. This will set a more casual and relaxed environment making it comfortable to have an open and honest conversation. Always try to end the conversation same way so that everyone leaves feeling optimistic.

3

ASK OPEN-ENDED QUESTIONS

Avoid questions that afford yes/no answers. Begin with who, what, where, when and why. Yes/no questions can leave you without a way to continue the conversation whereas open-ended questions will tip off the conversation and afford engagement from both individuals.

OPEN-ENDED	YES/NO
Who	Do
What	How
Why	Are
Where	Does
When	Can

4

ASK FOR AN OPINION

Asking for an opinion shows the other individual that you care about his/her thoughts and feelings. It shows that you have a genuine interest in learning their perspective.

5

SMALL TALK

To keep the conversation going and avoid awkward silences use small talk. Small talk allows both parties to share minor details that keep the conversation afloat.

The art of driving intentional conversation is vitally important to an advisor success. For more practice management information or insights about how we can help; contact your local AIMCOR member agency or visit us at www.aimcorgroup.com