bank advisor

The How-to on Giving and Receiving More

By Mitch Anthony | Published May 6, 2008
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I spend a great deal of time asking clients why they work with the advisors they do. I often hear the following: "He's just a really good person," "He's really on top of things," "He just gets it," "There's something special about him, but I can't quite explain it."

It's these last two that I will more fully explain. What do clients mean when they say, "you get it'" and "there's something special about that person"?

I'm convinced that to reach the highest echelons of success in the advisor business you must possess the three "I's" of personal composition: Intelligence, Integrity and Intuition. They work as follows:

- You must have *intelligence* on financial instruments, financial processes, financial markets and the economy in general;
- *Integrity* regarding what is sold, when it is sold, owning up to mistakes, and how clients are treated;
- And *intuition* regarding who your client is, where their comfort levels are, how they are impacted by current events and what matters most to them.

This last arena, intuition, is what I suspect highly satisfied clients are referring to with the "he gets it" and "there's something special" answers. Intuitive ability is a mystery to many but it need not be. Intuition is the side of your right brain at work.

But one major problem is that we haven't received instruction and training on the right side of our brains. We're just now coming to understand how the right side can help us build our business.

If you could work with two architects of equal intelligence, skill and experience but one possesses better listening and people skills and seems genuinely interested in understanding your vision of a home (rather than plugging you into their pre-conceived plan), which would you choose?

Is it a no-brainer? No, it's a right-brainer. You're going to choose the one that "gets it" - the "it" being that you need to be understood, heard and connected with in order to be satisfied with the experience. If you don't feel these emotions, you look elsewhere.

To be the advisor who earns and retains top-notch clients, it's imperative to lead with your right brain and follow with your left. Show them that you understand what matters to them first, and then explain how the processes, products and markets work.

Keep the following in mind: *"Who before what, why before how and big picture before detail."*

Too often, we use fact-finders when we ought to use feeling finders. We gather numbers when we should gather stories about clients' life and money. We dive into details before the big picture is clearly understood.

Not so with the best advisors. They understand that people come before money because people create wealth. They intuitively understand that connecting with a person precedes connecting with their wealth.

To get more we must be more. And every client is looking for that advisor with something more. Make sure they don't look beyond you.