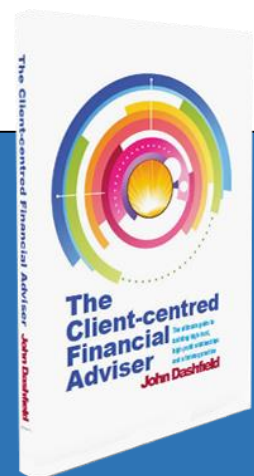




How to Create Clients

The art and science of engaging clients in meaningful, profitable
and long-lasting business relationships

From John Dashfield
Financial Services Business Coach,
writer, speaker and author of
['The Client-centred Financial Adviser'](#)



YOU DON'T GET CLIENTS; YOU CREATE CLIENTS

If I want a cup of tea then I'll boil some water and go to the cupboard to get a teabag. If I have run out then at some point I'll go to the shop to replenish my supply. The process of buying the teabags will be a very simple transaction. I am a customer. The shop assistant and I won't be sizing each other up to see whether we can do business together. There will not be any negotiation. And there won't be a second or even a third meeting about whether I'll purchase the teabags.

Clients aren't like teabags or any other commodity for that matter. You don't go down to the shops or anywhere else to 'get' clients. If you want a new client, you don't just hand over some money.

The process of engaging a new client is a creative process. It is far more than a simple transaction. The relationship with a client is a special relationship and as such it requires you to be deeply creative. It requires you to be in a healthy, secure and intuitive state of mind to:

- a) Not be needy
- b) Do your best work

Once we see the process as a creative process it begins to take us out of a low energy, victim mind-set of 'Why is it so difficult to GET clients?' That is the mind-set that has us be needy and it actually repels people because who wants to get into a relationship with someone who is self-absorbed?

The next level of discipline

To step up to the next level of success in creating clients it will involve moving up to the next level of discipline.

All worthwhile endeavours in life, if you want to reach the level of mastery, will involve practicing disciplines, which are really no more than particular ways of thinking and behaving that lead to specific results.

George Leonard, in his book 'Mastery' says 'The master of any game is generally a master of practice'. If you want to get good at golf, for example, it involves a great deal of practice. The very best players in the world spend hours and hours on the practice green. They don't avoid practice because they're really good. They know that the discipline of continual practice is what makes them really good.

And this is the best possible news. You don't want client creation to be some mysterious, by-chance and random process because that will never instil you with confidence. By learning and practicing the right disciplines you gain deep inner confidence because there is a crystal clear link between cause and effect.

Here are some principles to mastering the process of creating clients:

Time

If something is highly important to us then we give it the time it deserves. This is a basic law. What you pay attention to will expand.

Creating clients is no different. Connecting with people takes time. Having powerful conversations takes time. There are no shortcuts. Master Coach Steve Chandler, in his book 'Wealth Warrior' says, 'Success is all about creating relationships, and relationships are all about giving. You give your time, your love and your attention, and you create a relationship'.

If we say something is important to us but we are not giving it time then the reality is that it is not that important. Our behaviour proves it. Saying we 'should' do something but not doing it is just low level victim thinking. So, we can either re-prioritise what we do and give it the time it requires or forget it altogether and do what really is important to us.

Use your inner circle, introductions, referrals and invitations

Use your existing connections to meet people and create conversations. It takes creativity and imagination to work in this way but this path is far more productive than cold calling or meeting people in unfavourable circumstances.

You create the context of the relationship

You are the one who sets the tone and direction of your client conversations. You determine on what level the conversation takes place.

For example, clients or potential clients may initially talk about or ask for products. This is because the profession and providers have trained them to do this. So, someone might say "I want a SIPP" or "I want an ISA." But in reality no-one really wants those things. Yes, they may end up owning certain products but they are just a means to an end and not the end itself.

Entering into a client relationship as an arranger or provider of financial products can only make you vulnerable because it's reducing your service to the level of a commodity.

A far more meaningful and useful conversation is about what someone really wants out of life and the deeper you are willing to take your clients with this conversation the more value you will create.

Find the goal behind the goal

Behind any external goal or outcome there will be the real payoff, which are the values, criteria and emotional states that people want to experience. And these are what ultimately drive people. For example, it could be peace of mind, security, happiness or, in fact, any feeling that is important to the client.

It is extremely valuable to uncover these hidden goals with your client. You cannot guess what they are. Just because, as human beings we may have similar values, does not mean you can skip this. I once heard an adviser say "Oh, I know exactly what my clients want!" However, this is just mind-reading and there is a huge difference between thinking you know what someone wants and actually going to the trouble of finding out.

Conversations must have inherent value

Many advisers think that they need to entice, persuade and convince people that they should engage their services.

This is not necessary. Don't have a conversation about whether you should work together. Instead, create real value in the conversation. Have the client feel what it is like to work with you by deeply engaging them rather than just having an intellectual exchange.

Create the situation so that their decision is about whether to continue and not whether to start. It is far easier for someone to continue than it is to start, so why make working together a bigger step than it needs to be? You can only do this by having the conversations be incredibly valuable to someone. This happens through *creating* an experience rather than just talking about it.

Listen openly and without judgement

Ernest Hemingway said "When people talk, listen completely. Most people never listen."

How you listen to someone has a massive impact upon the quality of relationship you create. The only way to really listen to someone is to listen with nothing on your mind. It's not your job to listen with what you want to say next on your mind or even worse, cut someone off. It is not your job to pass judgement on someone's goals, desires or ambitions. It is not your job to try to steer someone down the route you want them to go.

It is your job to be fully present and allow things to unfold as they do and in their own time.

Let go of the outcome

You bring your power fully into the relationship when you let go of the outcome. You simply cannot afford to be needy. Needy is creepy. It's a major weakness. Needing to be liked, being afraid of rejection or thinking about the business you might get are all demonstrations of neediness.

You do not need any particular client or any particular piece of business. When you feel completely secure within yourself then this is extremely reassuring to your client because they sense that you are totally focused on them.

Focus 100% on serving

A powerful distinction is the one between selling and serving. People don't like to feel they are being sold to. Of course, there is a business element to what you are doing but what people really appreciate is service and being taken care of in the highest and best possible way.

If an adviser experiences push-back or resistance from a client then it is because they are giving something to push-back against, meaning that at some level they are self-interested and the client knows it.

Don't be a people pleaser

A people pleaser is someone who is averse to any kind of tension in a relationship. They give in to the demands of their clients. They shy away from speaking the truth or doing anything that might make the client feel negative. And it's a weak approach.

There may be times when to serve someone at the deepest level you tell them what they don't want to hear. You tell the truth as you see it. For example, you may see that someone's spending or debt levels are unhealthy and out of line with what they say they want to accomplish. You can either say nothing because you're afraid of upsetting the client and losing them or you can take a stand on behalf of your client.

If you have something important you want to say to your client then ask permission. Create an environment where what you say is taken in the spirit in which it is given, so you might say “I may be wrong but I’ve noticed something I think could be important. Is it ok with you for me to share it with you?”

Use the power of silence

Talking too much is often a sign of neediness and some professional people talk too much because they get nervous. Silence is incredibly powerful in a conversation. You are not using it as a tool or tactic. You are using your awareness of when to say nothing to allow people to process, consider and reflect upon what’s being said.

Be the leader

People come to a professional because they want guidance. They want to collaborate with someone who knows more than they do so that they can shortcut the decision making process. You do not want to come across as indecisive, so it can be a powerful thing to do to take the lead. Use your intuition to find the balance between leadership and coming across as being too pushy.

Love the process

People get poor results at creating clients because they tell themselves that they don’t like the process. They tell themselves they’re no good at it. They believe it’s just a necessary evil.

To get to the level of mastery you have to learn to love the process. When you love it, it won’t be difficult. It will be something you look forward to.

So understand where you are. It might be that right now you are not very good at creating clients. And that’s ok. Everyone who has reached the level of mastery took time and practice to get there.

If you are at a level where you hate the process this is just a sign that you are on the path. If it is what you really want to do then stay with it and learn from every experience. Before long you’ll be looking back at how far you’ve come and experiencing a level of confidence you may have never dreamed possible.

Be you

So often, what we present to the world is our 'constructed self'. This is the image that we think we should present to the world, like the live version of our LinkedIn profile. The problem is that this becomes very tiring to maintain and gets in the way of real connection with another person.

Track your numbers

Sales targets are often a waste of time because you have so little control over the end numbers. Therefore, to set a target such as £20,000 a month in revenue will either have you living on adrenaline and eventually burn you out or drain the life out of you because you find it so uninspiring.

What you can do is track your behaviour. For example, how many conversations did you have this week? How many people did you invite into a conversation this week? How many people did you ask for referrals this week?

Tracking is not used as a stick to beat yourself with. It's simply a communication about what you're up to. It starts to build a link between your behaviour and your results and is, therefore, a useful feedback mechanism.

No expectations

A life of expectation is a life of disappointment. It's so easy to make assumptions about what people might or might not do and then end up disappointed if it doesn't turn out that way.

Don't do this to yourself. Create agreements instead.

Be absolutely clear with your client or potential client about what happens next. For example, if you have a conversation with a potential client you can ask "What do you want to happen next?" or "What are you comfortable doing next?" Then you make a clear agreement as to precisely what will happen next.

Be great at what you do

When you can turn someone's finances around, help to make their dreams come true and give hope where before there was none then people will talk about you.

Being great at what you do is the best form of marketing you will ever do. This is because it has real substance rather than being a lot of hot air and extravagant promises, which is so often a feature of today's marketing practices.

So, what makes someone great at what they do?

A man once asked a cab driver "How do you get to the Albert Hall?" The cab driver replied "Practice, practice, practice!"

Of course, there are many qualities but here are some that really make a difference:

- The willingness to keep learning and keep practicing (and making mistakes)
- Focus on people, not products
- Hire an experienced coach to help you unleash your potential

What's next for you?

Before you do anything else please sign up for The Client-centred Adviser blog at <http://www.clientcentredadvisers.com/blog.html> and be amongst the first to receive new information and news about upcoming events and opportunities.

Read 'The Client-centred Financial Adviser – the ultimate guide to building high-trust, high-profit relationships and a thriving practice' Available at <http://www.clientcentredadvisers.com/book.html>

Schedule a conversation about what you want to accomplish, what the obstacles might be and whether you are ready to take your business to the next level. Just send an email to john@clientcentredadvisers.com and we will get back in touch.