

# abacus

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smart financial decisions



## Listen Your Way to Success

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## Overview

- 📄 Communication goals
- 📄 Effective interviewing
- 📄 Active listening
- 📄 Communicating about the process of advising
- 📄 Managing yourself
- 📄 Speaking the client's language
- 📄 Communicating at networking events
- 📄 Q & A



## Communication goals

- 📄 Take the time to listen
- 📄 Comment about client's reactions with understanding
- 📄 Remember the client's issues come first
- 📄 Remember the need to build, maintain, and repair trust



## The basics of active listening

- ☞ Uses reflective statements about feelings, showing empathy

- ☞ Use effective interviewing skills

  - Door openers

  - Open-ended questions

  - Clarifying questions

- ☞ Feed back an understanding of speaker's message

  - Use only one or two sentences

  - Use a feeling word, not a thinking word

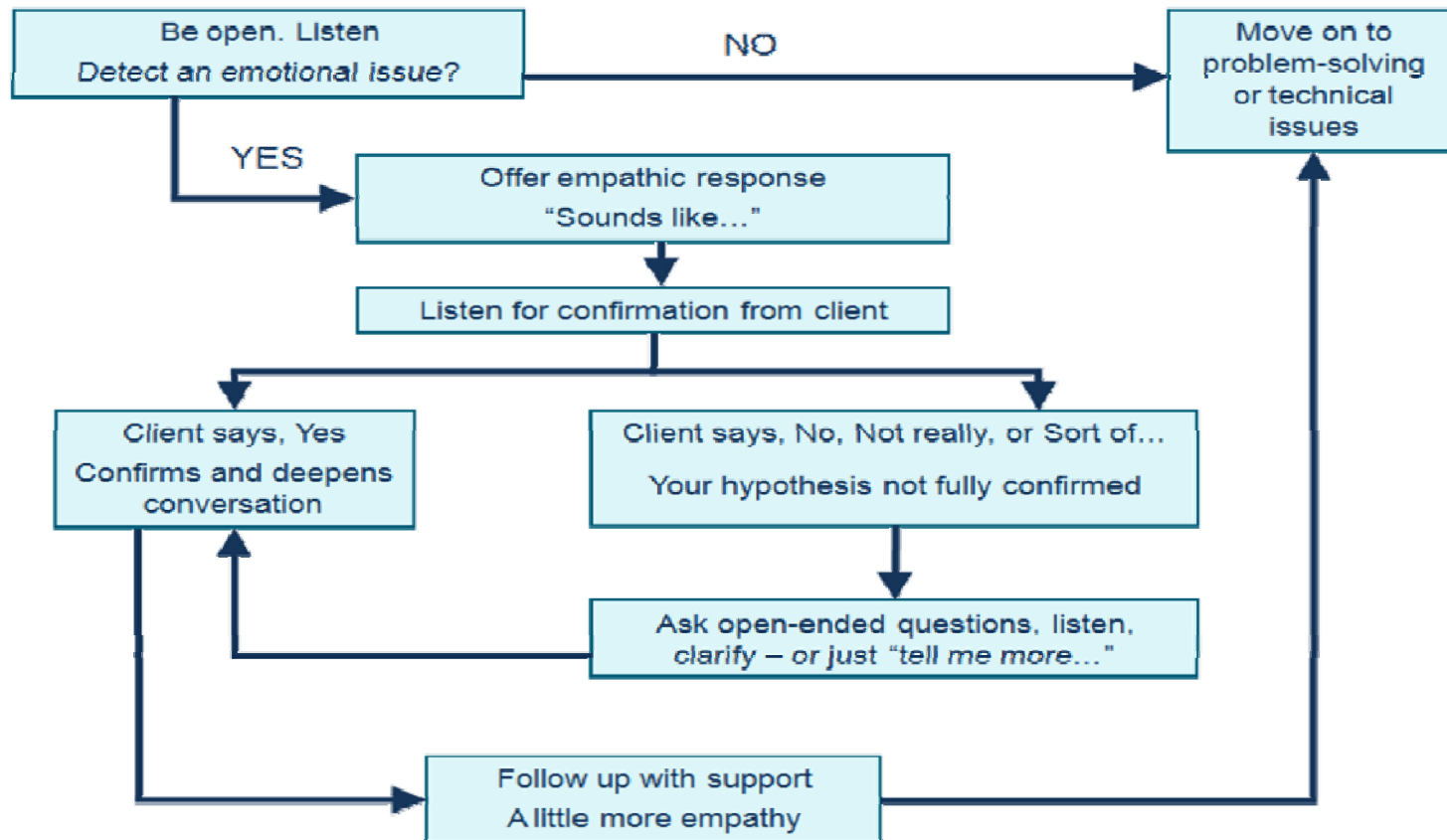
- ☞ Allow the speaker to then: confirm, modify, or reject



Intro	Feelings				[Content Issue]
<i>Sounds like you are</i>	Worried	Angry	Upset	Happy	<i>about</i>
<i>Seems like you feel</i>	Afraid	Irritated	Depressed	Relieved	<i>because</i>
<i>What I hear you saying is that you feel</i>	Overwhelmed	Frustrated	Sad	Grateful	<i>that</i>
<i>I get the impression that you are</i>	Anxious	Nervous	Fearful	Looking forward to	<i>by</i>
<i>I'm wondering if you feel</i>	Confused	Mistrustful	Fragile	Glad	<i>with</i>
<i>I have the sense that you are</i>	Paralyzed	Betrayed	Disgusted	Blamed	
	Unsure	Suspicious	Concerned	Alone	
	Abandoned	Miss	Discouraged		
 "THINK"	Unsupported	Stressed	Ashamed		



# Listen Your Way to Success





# Physical and emotional behaviors

## Attending behaviors

Eye contact, nodding, leaning in, sitting calmly, facial expression

## Passive listening

Being able to stay quiet, tolerating emotion, smiling, showing concern

## How you present

Tone of voice, variability of tone, emotions conveyed, facial expression, body movements, work actions

## What you say and how you look should be consistent.



## Managing the relationship

### Explain process

“I’d like to...” - “We’re going to...” - “Let me explain what I’d like to do next...”

### Ask permission

“I’d like to...” - “If it’s okay with you, ...” - “With your permission, ...” –

“If you feel ready, ...”

### Bring up issues in the advising relationship

Discussion of private matters

Acknowledgement and discussion of issues of trust

Concerns, mistakes, fees

Compliments/appreciation





## *Baa* communication

- ☐ Distancing behaviors

Sit away, fold arms, frown, looking elsewhere

- ☐ Finish client's sentences

- ☐ Interrupt frequently



# Speaking your client's language

## Your tools

- ☞ Use language that is appropriate for the individual's experience and level of interest
- ☞ Answer the most important question:
  - Why is this important?
- ☞ Use metaphors and analogies
  - General
  - Specific to this client
- ☞ Graphics, pictures, gestures
- ☞ Build from simple to more complex
- ☞ Make it interactive – a conversation



## Using the core communication skills in a networking situation

- 📄 Use effective interviewing – open-ended questions
- 📄 Use the tools of effective communication and look for:
  - commonalities
  - connections
  - passions
- 📄 When ending the conversation reference something that was said in the conversation and close with the use of their name.
- 📄 *Keep in mind that everyone at a networking event is there to network.*



## Communication goals summary – S.M.A.R.T.

- 📄 Speak the client's language
- 📄 Manage your emotions
- 📄 Actively listen
- 📄 Relationship awareness
- 📄 That it's not about you