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LEAD YOUR CLIENT TOWARDS THEIR **BEST LIFE**

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Lead Adviser Alumni
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The more I work in High Performance, the more I feel incongruous. Here I am, an average man, living in a modest house in the country, and whilst comfortable, I am not what you would call ultra wealthy. If I look at myself and compare my simple life to the Instagram superstars, pretty soon I start to feel second rate. I must really catch myself and remind myself that I have actually created my ideal life, and it is ideal, for me. I need to reject the need to compare myself to others.

It is the same when it comes to business. Ranking your business against some other so-called super practice only sets you up for doubt, confusion and feeling like a failure. So, on this journey towards being a professional Lead Adviser, **make a conscious intention to create a business that will serve you, your family, and your clients best. There is no one way, there is only your way.**

That being said, there are some principles and common traits that great Lead Advisers stand by. One of these traits is the ability to maximise your relational skills and your emotional intelligence. Let's take a moment to revisit the core non-technical skills.

The first element is to take a leader's mindset. The Lead Adviser develops and maintains a mindset that is curious, open, flexible and client centered. **Great advisers do more than help their clients fix their problems. They help them grow into people who stop having those problems.** Plus, advisers need to show up as living examples of being well organised and living their ideal life. Walk the talk!

Now let's look at the essentials of the Lead Adviser's relational skills toolkit.

1. Trust

So many professionals sprout the 'trusted adviser' rubric, yet so many misguidedly assume trust without earning it. The elements of trust are:

➔ **Credibility** – Do you know what you are talking about? Are you a subject matter expert on project management, estate planning, asset protection and all the other aspects that Lead Adviser work entails?

➔ **Reliability** – This is much more than simply delivering on time. It is about setting and meeting client expectations. It includes ensuring the client experience is one of repeatable excellence.

➔ **Intimacy** – Are you willing to go deeper with your clients? Can you assist them to explore their emotional and spiritual selves? Can you create positive tension and mutual vulnerability?

➔ **Self-Interest** – This is often the killer of trust. If your ego and selfish needs underpin the relationship with your client, then trust is lost. View everything through the lens of mutual benefit and fairness.

2. Empathy

Don't get empathy confused with sympathy. Empathy is standing with your client and helping them work out their best path forward. It includes seeing their world through their eyes, understanding their feelings (Sad, Mad, Glad, Scared – page 25 in the Lead Adviser Workbook), seeing them as human beings not objects that help you reach your KPI's, and communicating that you understand.

3. Intention

Try to remember that your purest intention is to help your client visualise, attain and live their best life. We often get caught up in our own needs. Your job is to help clients enrich their lives, add value, simplify, inspire, and bring a sense of confidence, capability, and direction. This is what client-centered advice means. You will feel more fulfilled and consequently become more enriched yourself.

4. Questioning

This is a master skill that needs constant practice. Often, we go onto 'auto pilot' and ask our standard questions. Use the 10-3-Now process (outlined in the training video on Lead Adviser Virtual). Get curious about their ideal life. Explore the Live, Love, Learn, Legacy framework (the 4 L's that Scott Fitzpatrick speaks about on the FPW homepage). Ask how they feel about their current situation. Great questions help both the client and the Lead Adviser get present to their truth about an issue. They help clients explore their future hopes and dreams. They build a shared context between client and adviser. They create the human connection. (L.A. Virtual has 101 Great Coaching Questions for you to revisit)

5. Profound Listening

Listening is often described as the greatest tool of healing. When we listen with our complete self, we allow the other person to feel honored, valued and acknowledged. Here are a few tips.

- ➛ Ask the question, then be quiet. Give them time and space.
- ➛ Listen with your eyes. Have your assistant sitting in the second chair. Ask and observe.
- ➛ Don't listen to the details of their story, listen for what that story means. i.e., listen for context.
- ➛ Listen for what is not being said. What does your intuition tell you that they are avoiding? Go there!
- ➛ Listen for 'power' words. Often, these are stressed differently, or repeated throughout the meeting.
- ➛ Beware of statements that people hurry over, half mention or throw in as an aside. Once again, trust your hunch and go there.
- ➛ Listen without judgement. You are not their moral custodian.

Finally, remember to respect and honor your client. Act professionally, connect professionally. And don't forget you are a Lead Adviser not a Lead Suggester. Give strong advice, own the task of leading your client towards their best life.

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Brian Fitzpatrick works as a high-performance coach for business owners, executives, professionals, and elite Olympic athletes. He empowers people and teams to clarify, plan and implement their goals to create the businesses and lives they want to lead and the outcomes they want to experience.

He is passionate about helping people adopt greater Emotional Intelligence skills as a complement to their technical skills and a direct driver for personal fulfilment and achievement.

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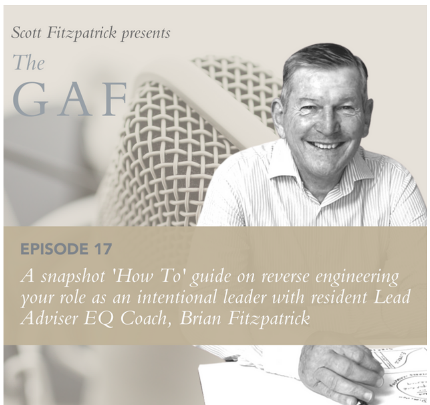
LEADERSHIP



SCARF MODEL

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