Thirty Seconds to Better Client Conversations

By Dan Richards*
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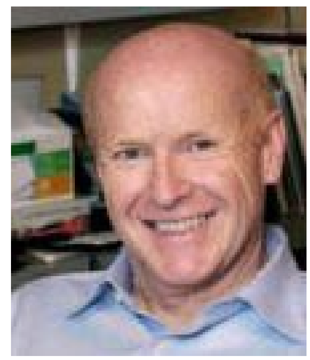

We're all looking for ways to make the time we spend talking to clients on the phone and in meetings more productive.

Recently, I spoke to an advisor who made one small change to his routine that led to better results from client interactions. With an investment of just thirty seconds before each call and meeting, he has seen a meaningful change in outcomes.

At the beginning of each day, he takes a piece of paper and divides it into three columns.

Each time he picks up the phone to call a client or gets set to go into a meeting, he takes thirty seconds to enter the client's name in the left hand column.

In the middle column he writes down the single most important thing he wants to achieve in that phone call or meeting.

When he's completed the call or the meeting, he does one final thing - he writes down whether the objective was achieved entirely, in part or not at all.

At the end of the day, he adds up how many of the conversations led to partial or complete success against that key goal - and he tracks this by day and by week.

This advisor also uses this to track the number of outbound calls he makes each day and client meetings he holds each week; since beginning to monitor these numbers, he's seen an increase in the number of proactive phone calls to clients.

Doing this and this alone has made his client interactions more productive. It's a little thing - but often it's the little things that make a big difference in the return on our time.

To make your time more productive, give this a try and see if you too see a change as a result.

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** Dan Richards conducts programs to help advisors gain and retain clients and is an award winning faculty member in the MBA program at the University of Toronto. To see more of his written and video commentaries and to reach him, go to www.strategicimperatives.ca.*