Before you jump to the wrong conclusion, let me define my “problem.” I’m not very effective when I coach male advisors how to deal with women, whether meeting with female prospects or couples. I don’t have this issue with female advisors, who generally are more empathetic and sensitive to these issues than men.
My lack of empathy

To be fair, I need more empathy in recognizing situations that are perceived by women as offensive. Here’s a recent example.

I love this video. It’s been viewed over 15 million times on YouTube. I thought it was an excellent way to teach empathy. Professionals (of both genders) agree.

But a woman who read one of my articles took me to task for using it. She thought it objectified and trivialized women by having the female character in the video portrayed as having a nail in her head.

When I reviewed the video from her perspective, I saw she had a valid point. I still love the video, but no longer use it.

Challenges

The goal of any meeting is to treat all participants equally. While easy to state, it’s surprisingly difficult to achieve when the advisor is male and one (or the only) participant is female.

In this recent New York Times article, Jill Filipovic summarized the ways men demean women. Here’s a partial list:

- Women are routinely harassed on the street.
- Women have been assaulted or killed when resisting harassment.
- Women who report assault or harassment are often presumed to be lying.
- Women in business are subject to sexual harassment as a means of controlling and dominating them.
- Women who speak up at work are perceived as unpleasant, aggressive and less competent.
- Men interrupt women more than women interrupt men.

The female prospect at your meeting has likely experienced some of this conduct, which makes it all the more compelling to treat her with respect and deference (although no justification is required).

The primary challenge occurs when meeting with couples and the “alpha male” prospect dominates the conversation. It takes real effort to look directly at his spouse and ask questions like: “Do you have the same views about risk?”

One metric I ask advisors to consider is whether at least 50% of their questions (questions are a critical component of the Solin Process℠) are directed to the woman. Another is whether the woman is speaking at least as much as the man.

I emphasize this point: At the end of the meeting, you should have a good grasp of what’s on the mind of both participants. If you don’t, you’re unlikely to capture the business.
Bumps in the road

Things don’t always go smoothly, even when you follow this advice. One client told me he met with a couple nearing retirement. He asked the man to discuss his feelings about risk and then posed the same question to his wife. Before she could respond, he said: “I don’t appreciate your trying to drive a wedge between me and my wife.” He stormed out of the meeting, followed (reluctantly) by his wife.

Don’t let this story discourage you. As the photo above says, “Men of Quality Respect Women’s Equality.”

Dan Solin is a New York Times best-selling author of the Smartest series of books. His latest book is The Smartest Sales Book You'll Ever Read. His sales coaching practice includes helping advisors convert prospects into clients and generating leads through videos and other elements of marketing. Dan is not affiliated with any advisory firm.

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