

The Whoosh Pattern Revealed

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Adventures from the field

Occasionally, during my travels from one training event to another, I arrive in the city of one of my coaching clients. Time permitting; I enjoy having a face-to-face meeting with clients with whom I often have had only an over-the-phone relationship (sometimes lasting for years). Sometimes during those meetings, we meet with their bankers. Several of those meetings have provided some interesting insights into using these techniques to build your practice.

The following conversation took place with a coaching client, one of his bankers and me. After the conversation was over the client said, "I could track a lot of what was going on there, but I think that there was much more going on below the surface and he asked if I could debrief him. That, combined with the explosion of referrals he started to receive, caused him to say, "I don't know how to thank you." I assured him that his continuing patronage of the coaching gym and his permission to publish this case study would be thanks enough. He agreed on the condition of anonymity (not wanting it to get back to his banker in a way that she might view negatively). So here you go:

My client "Jim" has been working in a major bank program for about five years. For the past few years, he has helped his bankers clearly understand what his ideal client looks like and how to powerfully refer people that met that profile. He is a master of execution and has non-stop energy. His results are nearly flawless, with one exception--"Geraldine".

Geri is a 23-year bank employee. She went to work for the institution right out of high school and it is the only job she has ever had. My guess is everyone reading this has met a Geraldine in his or her institution. Her customers love her, often waiting 30-45 minutes to see her. Often other bankers will ask if there is anything that they can do, only to be told, "No I am waiting for Geri".

When Jim took Geri through the Outcome Centered Sales Model Training for Bankers (where we teach bankers to think of their customers as clients--someone under their protection) her initial reaction was, "These folks are not my customers or my clients, they are my friends, and many of them are like family".

Geri occasionally gives referrals, but only if the client asks specifically about investments. In her mind, salespeople are pushy, self-centered people whose goal is to separate a client from their money and get paid a healthy commission in the process, regardless of whether it is the right thing to do for the client or not.

She and Jim get along very well, she speaks very highly of him, and when she does refer, she does it with a conviction that has the clients predisposed to doing business with Jim. He would just like to happen a lot more often.

Jim had taken the banker through the Outcome Centered Sales Model for bankers about one month prior. While it had a dramatic impact for many of Jim's bankers, it has not moved the needle for Geraldine.

This meeting took place after the branch closed at a nearby grill. Jim covered most of the information above on the trip to the restaurant. Initially, everyone just chatted and then the conversation turned to business. That is where the transcript picks up.

The comments in blue italics are my running commentary and not part of the original conversation.

BC: What kind of success have you had so far with the questions?

Banker: I really haven't had a chance to ask them yet

BC: Haven't had a chance?

Obviously, this was not the case, not after a month. In addition to calling her bluff, I scrunched my face almost painfully in a way that I hoped would cause her to continue with an explanation.

Banker: I am actually a little nervous about asking them

Surprisingly quick honesty, Jim has obviously created an environment where she feels safe and does not need to play the corporate "team-speak" game. This is a tribute to his skills. Here she is telling us that she is banging up against the edge of what is possible based on the current set of beliefs she has about her deepest values and how she defines them. Whenever you hear this in a banker or a client that is a clue that you have the ability to "reframe" some of these definitions and expand their possibilities.

BC: Because?

We have to get to the answers behind the answers--she must have some beliefs that are causing this fear. We do not yet know what those beliefs are and I suspect they are at the root of our problem.

Banker: These are my really good clients and I am worried that if I start pushing products on them that they will not like me anymore because I don't like pushy sales people and neither do they. These relationships are too important to me.

I hear this answer frequently. It is due to an early age imprint about sales people. Most people's word association with salespeople is negative. You might hear, "sleazy, greasy, high pressure, persistent. A significant hurdle one must be willing and able to overcome if you hope to introduce or expand the "sales culture" in your institution.

BC: Oh, my goodness I know, relationships are important to me too. What is most important about your relationships--to you and your customers?

The term "relationship" is a very broad term. It would be a mistake to assume that we know what she means when she says relationships, much better to ask her. Affirming that we agree with her builds rapport and distracts from the fact that we are digging deeper.

Banker: It is everything. You see that is why I got into banking because I

wanted to care for my customers. Now we are really starting to create this sales culture but I just don't like being pushy. I have clients that have been with me for 15-20 years that have followed me from one banking center to another and the reason that they do that is that I care about them and they know that.

Our banker had a noticeable shift in her physiology at the beginning of this conversation as we moved from chitchat to business. At this point she was making her points with congruency (telling me that she really believed it) and with vigor (telling us that we would be in for fight if we tried to change her mind). My goal is to do the exact opposite. These are intense and powerful triggers; my goal over the course of the next few minutes is to intensify her passion in these beliefs but change some of her definitions for knowing when they are fulfilled.

BC: That's a remarkable compliment when they follow you. What do you think you are communicating to them with your relationships?

It is a high compliment and she was clearly proud of their loyalty--rightly so! Now, I want to delve deeper and deeper and fully elicit her map of the world. Understand what makes her tick and to be able to expand her horizons beyond whatever self-imposed limits her beliefs have given her.

Banker: That I care about them, they can trust me with all of their banking and financial needs, and I will never do anything to violate that trust. To me it is like a sacred oath.

Okay, now we are getting to some core beliefs and values. These things really drive her. She associates these things with her core identity. Now, let's turn up the intensity of these feelings and then trigger them to us.

BC: That must give you an incredible feeling...

Banker: Oh, it does, you have no idea.

BC: Well, tell me.

Here, we are in essence asking, "What are you feeling right now as you think about those things?. This is a different (and the difference is important) way of asking, "How does that feel?" When you ask, "How does that feel?" a person must step outside of himself or herself and dispassionately evaluate what it feels like--meaning they must do a search in their mind for some associations they can use to describe the feelings to you. When we ask, "What are you feeling right now" we are asking them to stay in the moment and just give us a running commentary. It is the difference of enjoying all the aspects of a fine wine, a beautiful sunset, or the touch of your lover versus trying to tell someone what it tastes, looks, or feels "like".

Banker: Oh, it is just the greatest feeling in the world. It gives me the sense of giving and connection. It allows me to feel like work is really a part of my ministry. It gives me a warm glow inside that I am really making a difference in people's lives and I am really being of service to them.

Now here we are going to stop going deeper. This is as deep as we need to go and if we asked for clarification, we would be asking her to step outside of herself. We want her to stay very much in this moment.

If you go back through the dialogue, you will notice that Geri experiences the world more through one of her five senses than the other four. Have you noticed that already?

Think about it for a second, make a guess, then go back, and reread it. Odds are good it will be obvious now, if it wasn't already.

We were both using triggering techniques to enable her to recall these feelings later as we baked ourselves back into her happiness recipe.

BC: Oh, my word that must be why you and Jim (the advisor she works with) get along so well. That is the exactly the way he feels. He shares those values with me in our meetings all the time. You know, I bet you could help us out with another situation we were struggling with earlier.

I have been doing most of the talking, so let's get her to associate those feelings to Jim, and not me. At this point she isn't really thinking anything at all about the questions, why or why not she is answering them or any real feelings at all that this is a business meeting. We have taken her deep inside, in touch with her core identity. Her physiology indicates that

she is feeling very good.

Banker: I'll try.

BC: Jim was telling me about a situation that he had with a new client a few weeks back. He asked me how I would handle it, and I would love to get your feelings.

We had discussed what we thought the problem was likely to be and had already decided on incorporating the strategies that we covered in the last strategy. In this case it was easy because Jim had several of the "didn't get the invite situations" and the Verizon story is one that I tell in training situations frequently.

Jim: Yes, I had this situation with a new referral. I met with her we had a good conversation. She was very uncomfortable with her relationship at Morgan Stanley and we were able to open an account. You could definitely sense that a huge weight had been lifted off her shoulders. As we were leaving she said, "I can't tell you how happy I am that you offered this now. I have always trusted everyone and felt so comfortable here; I know that I am going to feel a lot more secure. How long have you been doing this here?"

Geri probably hears these things on a regular basis. Did you notice how elegantly Jim matches Geri's sensory preferences?

Jim: About 11 years--and at this point she had a visceral reaction that you knew she felt very let down. You could sense that she was going back in her mind and having to relive all the discomfort of the past years she has had with those people. Then she looked at me and asked, "Why didn't someone tell me about this before?" I didn't know what to say.

Although Jim is talking about his new client he is covertly directing Geri's unconscious mind to go inside, feel let down and relive all of the past years of discomfort as well.

Banker: That's awful

I couldn't have said it better myself. We started this story on the pretext of getting her help, the only answer is we should be letting people know about all the products and services that we provide--that is in fact, the conclusion I would like her to reach but first let's serve up another helping.

BC: Yeah it's weird the messages that we send sometimes isn't it? I just had an experience that maybe you can relate to. I changed cellular companies because this new company had a great deal on a new phone that I wanted. Went in, signed the paperwork and told them I wanted to keep my number, so they told me I had to call the old company and let them know that I was "porting" the number to a the new company. So when I called them, can you guess what they tried to do?

Banker: Keep you

BC: Exactly, has that happened to you?

Banker: No, but to my friends

Oh well, missed on this one. Often in live events with many bankers, I can get a very rambunctious conversation going about the lousy service that phone companies provide and the impact of what I am doing here is even stronger. When that happens I love to let them just run for few minutes occasionally throwing fuel on the fire. In this case, I have to do all the heavy lifting myself, but it still works.

BC: Yes, they were tenacious too. Told me all about better deals that were available, that I could use a loyalty bonus to get a better deal and they could even upgrade my plan and give me more for less money. Come on-- how do you think that made me feel?

I said this with a facial expression one might have after realizing they just stepped barefooted into a fecal landmine left by the neighbor's dog.

Banker: Yeah, like they didn't care

BC: Exactly. They didn't care about me. They weren't looking after my needs. They were just going through the motions. I didn't feel like I could trust them or that I had any relationship with them at all. I said, "All this time with you and no one has ever bothered to give me a call to let me know about this, send a letter, nothing? You know what she said?"

I am introducing this new trigger to her. As I am telling this story, I am intertwining a heavy dose of disdain for companies that only exhibit any real client service until a client is trying to move their account and they realize that the "It's not my job" mentality really doesn't cut it in a heavily competitive environment.

Banker: What?

BC: She said it's on the website and if you had ever called, we would have been happy to have reviewed your account. I said Gee, thanks.

As I said earlier, when Geri does refer she does it powerfully. Jim has made several different attempts to get her to be more proactive, but she has always resisted, not wanting to strain the relationship. She usually comes back with, "but when they ask me about investments I always tell them how great you are and how they need to meet with you". In her mind, up until now, this has actually been performing above and beyond the call of duty, she is suddenly realizing that what she has been doing is not enough, and I haven't just been talking about the people at the phone company--I have been talking about her too!

BC: Here's the thing. I think it is normal and natural to make sure you don't strain a relationship.

Most people's natural tendency here would be to defend themselves by pointing out how they are different than the phone company people and how what I have been talking about doesn't apply to them. I don't want to have that conversation so I am just letting them off the hook with this statement. It is in essence analogous to telling someone that they have been screwing up--but it is not their fault and that you are going to tell them what they need to be doing going forward. We are giving you a mulligan on all your past regressions and setting the stage for what we

expect going forward.

BC: Nobody wants to be pushed into doing something that they don't want and even though I don't know you very well, I know you would never do that--and you know what else I believe? I feel like anyone who spends more than about seven seconds with you is going to know that too. You send out a wonderful warm glow, I feel like that people can easily and effortlessly sense that you have their best interest in mind.

This is not a fancy language pattern, just an observation. She does send out a warm glow and you can tell she is always working from very deep integrity. This is also designed to insulate her from the fear that people will think that she is trying to pressure them. I believe that in Geri's case (and most sales professionals) people can notice that just as quickly as you can notice someone that is very desperate and needs to make a sale today or they are going to lose their job.

I want ask you a favor and make you a promise, can I do that?

Banker: Well, you can ask.

BC: The favor is I want you to give those questions that Jim taught you a try, and I want you to sense the effect that it is having on the people that you ask.

In her mind asking those questions equals being nosy and pushy, I am going to give her a new more powerful belief to replace that old limiting one.

BC: Some people are going to feel very good about it because they have a problem and you have the solution.

Probably on some level at least, she already knows this, and for her this is not were the risk lies. This does, however, pace her on-going reality and creates a space for me to introduce some new ideas for her consideration.

In addition, I want you to notice the way the people who do not have a

need today feel. I promise you if you ask the questions the way Jim taught you, no one is going to have a single adverse feeling--in fact, I am curious as to just how many of them will feel even better about the relationship they have with you, knowing that you are not just going through the motions.

Revisiting the negative verbal trigger from the story with the phone company.

In fact, part of you can wonder just how much more deeply your customers are going to start to feel good now; while another part of you can begin to realize how much warmer and stronger that inner glow is going to grow as you now have the ability to serve everyone that you come in contact with, not just the ones that ask for it.

This is a different use of parts integration that has the effect of deepening the level of concentration of the person that is listening to you and allowing more of your verbal communication to pass directly to their unconscious mind, bypassing many of the critical judgment factors. Typically, when people use this technique themselves, it is to analyze both sides of an action or argument. For example, part of me wants to pass on dessert because I don't need the calories, but the other part of me is saying, "Hey, you have been really disciplined, one slice won't matter-- anyway we are celebrating tonight."

Used in this fashion where both "parts" are actually going for good outcomes tends to suspend critical faculties and open the mental doors of the object of your persuasion. Also the use of her specific core identity triggers (the warm glow getting stronger and the ability to serve everyone that you come into contact with) links us back to the powerful feelings that she was experiencing a moment ago and intertwines the pathway to feeling those feelings to her asking the question to literally everyone that she sits with.

At the end of the comment, I was looking deep into her eyes. She looked back into mine and it was clear she was integrating all of what we had just talked about. Jim said later, "It was like you could watch her brain rewire itself while she sat there looking at you". She looked at me for about 10-12 seconds and then broke eye contact and looked at Jim. She smiled and then just started laughing. Jim and I laughed too and then Geri said, "Wow, if I can make my customers feel half as good as I feel right now, I would be crazy not to do it!" On that note, we all high-fived!

That meeting took place on a Tuesday, Jim told me the following Monday that he had received 7 referrals in the next 3 days, more than twice her normal monthly output. She has since moved from a mid fourth quartile performer to his #1 referring bank rep. This illustrates perfectly one of the most powerful principles in persuasion

People will sometimes believe what you tell them; but always accept without resistance the conclusions they come to on their own.

Leading them to those ideas and conclusions is an eight-fold path

1. Develop and maintain a deep level of rapport
2. Elicit their deep emotional outcomes
3. Experience their map of the world
4. Understand their recipe for their personal happiness cake
5. Determine if you can help them experience that happiness more deeply, more often, or more profoundly
6. Help them to expand any beliefs that are limiting their enjoyment of life to the fullest
7. Integrate these new beliefs, thereby including yourself as a key ingredient in their new happiness cake
8. Move them to action

Deep in the reptilian areas of our brain, imprinted on us at a very early age, we have deep emotional outcomes that we desire to achieve in our life. In most cases these are so ingrained into our system, they defy description. You just know when it is right. Our logical minds want to be able to understand and express these emotions so we nominalize them (give them a name or create a label.) These become our values. While our values are typically static throughout our lives, how we define and determine whether our values have been or are being achieved is dynamic, these are our beliefs. Our beliefs govern our thoughts, our thoughts control our behaviors, and our behaviors lead to specific actions.

Much of what passes for persuasion takes place on the level of actions. We attempt to introduce new behaviors in our own life through will, making brittle commitments to turn over new leaves. The futility of this is wonderfully illustrated in the pile of cars that crowd the parking lots of gyms and health clubs throughout America during the first few weeks of the New Year, only to evaporate long before the snow has begun to melt. In the world of selling, much time is wasted attempting to logically prove to the objects of our persuasive desire that doing business with us is the smart thing to do. In the world of financial services, this manifests itself through Ibbotson Charts, Asset Allocation Quilts, Hypothetical Illustrations, and Monte Carlo analysis and Morningstar Reports-- useful tools, but not helpful in aiding our clients and prospects to take action in their own best interest.

People are goal-seeking organisms. When we climb what we believe is the highest mountain, we can usually see a higher peak that ignites in us a new flame. Often our clients have difficulty understanding what it is they truly desire and even when they do understand that, they often don't know the best path to reach that destination. Your ability to understand and read their map and expand it to new horizons and peaks places you at a seat of honor in their lives, an indispensable resource in the only place that it really matters...the mind of your client!