

## **Building a Solid Relationship with your Bankers**

Positioning is half of the battle. Find out what she would like to see or have in a financial adviser. We want to understand some of her decision criteria and the way that she goes about making the decision and knowing that it is, that she is getting what it is that she is looking for.

I think it is probably safe to assume, we never really want to assume anything but one assumption that we can probably make is she wouldn't be meeting with you if there weren't a lack someplace.

A very important thing for you to keep in mind when you are meeting with a prospect, when you are meeting with a client, when you are meeting with a banker, really when you ask anyone for some of their time. I look at time is our most valuable and only non renewable able assets because when its gone its gone. So if they had a phenomenal relationship with an advisor already, whether it's a prospect or client or somebody who can refer business to you, probably you aren't going to get on their calendar. So they are looking for something.

You want to very much avoid jumping too quickly into your story and what your ideal client looks like and how you work with them. Because ultimately when you make your presentation you want to be making the presentation in a way that all of the points that you are making about the thing that you are doing and the stories that you are telling and your procedures and everything you want them to as closely as possible, assuming that once you understand their criteria and that it is somebody that you want to work with. You want to be aiming all of your features, advantages benefits, and the reason is that they ought to be working with you directly at their decision criteria.

So you want to aim it at that. Get a good conversation going, rapport building and all that good stuff that you do, some of those light questions and then I would start:

Let me ask you a question, If we were to begin working together what would have to have happened so that we can be looking back 90 days from now (so he changed the time frame. He made a lot closer) for you to think to yourself. Man now finally I am working with an investment guy who gets it? And we have got relationship that is firing on all 8 cylinders?" it's very easy, it's very conversational but it is still to the point.

Asking the banker to move out, 90 days into the future bake your ' happiness cake' and tell me what the recipe is. And let me see if that is something that I am a good fit for you.

Just like when we talked about all of the different ways that we have to get that floodgate experience and we don't really want to proceed until we get it. The same thing is true with your bankers. Make sure you get that Floodgate Experience. Get them to open up and really share.

So now they are going to start telling you what it is that they do want and now you want to start deepening those answers, just like we did on the investment side. If they say, "well communication is important to me." And you can say, "me

to, that definitely is but what is it about communication? What is it about communication for you?" And they say, "I hate calling clients and not knowing if you have contacted them or not." So now you can flip that around, "well if you do know that what happens? How is it different when you do know that?"

Or you could acknowledge and validate it, "yes I know what you mean I feel exactly the same way. When you've got that what does that mean to you when you are able to call that client back and you know exactly where we stand in a relationship?" and then they say, "that's great! I like that a lot because now when I'm calling them back I am demonstrating to them that I am on the ball, I know what's going on and I am showing them that I care."

So now we have taken the knee-jerk response or their surface level response, which is, "communication. I want good communication!" So now we want to say, "If you have communication what does that give you? What does that mean to you? What are you going to be experiencing if you have that?" – I am on the ball, I care about them, I know what is going on in their account! Bingo! I like that. I am feeling good about that.

Can you have remembered a time when you have had that? Or you could say, "man I can see in your eyes at that is a pretty powerful experience for him. You must have experience that at one time?" "Yes I've experienced a lot of." "What's it like when you're experiencing that?" "It's great." you can feel that their client really feels very differently about you, yourself rating yourself from the competition. blah, blah, blah, blah, blah, blah, so now you are getting all of this additional information that is going to be very, very useful information in you putting together a presentation that you are going to give back to them. What do you think is happening to them as they are going through all of that stuff and reliving these very positive moments?