Powerful Communication Skills
Asking the Right Questions and Listening to the Answers

99.99% of client, employee, and vendor breakdowns are predictable.

You're only as good as people say you are.

Information is power. Power is control.

Reality Check

Write three client's names here.	Prefers email or voicemail?	Pet peeves?	Why did they hire you over someone else?	What would motivate them to replace you?
1.				
2.				
3.				

What are clients satisfied with? ____

What would make clients more satisfied? ____

The Speaker:

Shari Harley runs a training and consulting firm helping organizations get and keep the right customers and employees by creating better business relationships. Before launching her business Shari led leadership development training for OppenheimerFunds; Mass Mutual Insurance, conducted customer service training for American Century Investments; J.P. Morgan Chase, facilitated for Dale Carnegie Training, and held a series 6 and 63.

Shari is the author of the forthcoming book *How to Say Anything to Anyone.* She has a master's degree in Communication and taught leadership development at the University of Denver. Her clients include the FPA, Great West Life, Clifton Gunderson, Experian, IBM and many others. She has spoken in India, Dubai, Australia, Singapore, Malaysia and Thailand. Shari's almost alarmingly engaging style makes it impossible to nod off in her programs. Participants will be laughing while they're learning, and will walk away with tools and techniques to transform any relationship.

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The Formula for Strengthening Business Relationships

Request Candor

"I want a good relationship with you. If we work together long enough, I will do something that violates your expectations. When I do, I hope you will tell me. I promise I will say thank you."

Ask Permission to Give Feedback

"I'd like to be able to do the same with you. If something is preventing us from doing the best work for you or providing you with the best service, is it ok if I tell you?"

Don't Guess

"In addition to knowing your life goals, plans and concerns, I'd like to know about your working style preferences so I work with you how you like to work. Can I ask you a few questions about how you like to receive information?"

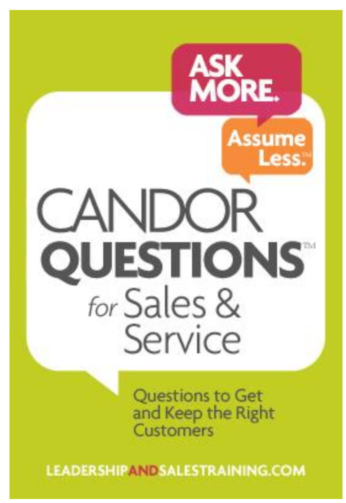
Set Expectations

"When we do our portfolio reviews, I'm going to ask these questions again to ensure you are getting what you need, how you need it. And again, I hope you will be candid with me."

Differentiate yourself by asking questions others don't.

- How often would you like to meet?
- Do you prefer scheduled or impromptu calls?
- Do you prefer to meet over the phone or in person?
- What time of day is best?
- How will you know you chose the right financial planner (how are client's evaluating you)?

- What's the best thing about my service?
- What do you wish I would do more?
- What would make our meetings more effective?
- What's it like to call my office and talk with my assistant or our receptionist?



Notes:

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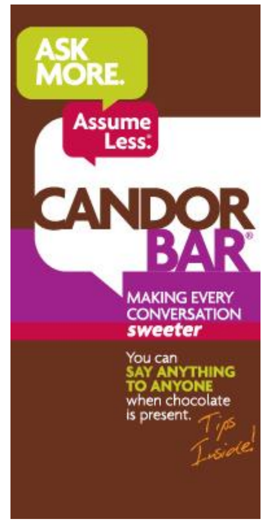
Human beings get defensive when they get feedback.

To get more feedback ask for it & promise you'll say "thank you."



Next Steps: Conduct Relationship Inventories™

1. Call your best clients and could-be-best clients.
2. Ask about clients' working style preferences.
3. Ask for feedback. Say thank you.
4. Tell clients you'll ask these questions each time you meet.

Bonus Questions:

- Write down the names of prospects who didn't hire you.
    - Why didn't s/he hire you?
- Write down the names of clients who stopped working with you.
    - Why did s/he stop working with you?

Notes: