

Communicating with Ease

COMMUNICATION IS AN ART

By learning to communicate effectively with others and especially with clients, you will strengthen relationships. The following points may help and by practicing them every day until they become habit, your communication skills will be an asset in your business.

Focus On the Client, Not Yourself

- Learn to understand what your client is trying to accomplish.
- Ask open-ended, thought provoking questions about their dreams and goals.
- Actively listen and if you don't understand ask more questions.
- Take good notes to refer back to later.

Understand Differences in Behavioral Style

- Styles are often revealed by body language, tone, and pace, as well as words.
- Observe and try to match your client's style.
- Some clients are fast paced, while others are slower-paced.
- Some want interpersonal interaction, while others prefer to work independently and be left alone.
- Some use logic and a thoughtful, deliberate process, while others like flexibility and change.

Understand the Importance of Differing Values

- Values dictate what we care about and the decisions we make.
- Refrain from assuming that your own values are shared by your clients.
- Probe and learn what matters to your clients.
- Make financial recommendations based on their values, not solely on investment returns.

Drop Any Conjectures About the Client

- Don't assume they understand what you're presenting.
- Help them to learn — explain concepts without using jargon.
- Don't generalize or categorize.
- Repeat and paraphrase for understanding and agreement.
- Learn to watch their body language to determine their grasp of your presentation.

Always Put the Client First In All Communications

- Personal trust is the key to building long-lasting relationships.
- You must convey, in all client interactions, that the important thing is to provide objective information while meeting the client's needs.
- You should be proactive and communicate with clients frequently.
- Use multiple forms of communication — phone, hand-written notes, letters, and e-mail — unless the client has clearly expressed a preferred communication method.

TO DISCUSS WAYS IN WHICH AQUILA GROUP OF FUNDS MAY BE ABLE TO HELP WITH YOUR MARKETING EFFORTS, PLEASE CONTACT YOUR AQUILA REGIONAL SALES MANAGER OR CALL 800-437-1020.