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Making The Connection

Learn this three-step system for developing instant rapport with elders

By Kelley Keehn

At twenty-nine, I believe that I was one of the youngest graduates of the EPC program around this time last year. Although servicing an elder market for most of my decade plus career in the financial industry, the insights of the EPC faculty further solidified my need to focus on this segment of the market.

One might assume that a now thirty year old should cater to her own peer group; however, the elders of my community have always enjoyed my counsel and approach. An informal survey I conducted with my retired clients during my time at a major bank and then during the years of running my own financial planning firm, produced interesting results. My clients told me that they enjoyed truly being heard, feeling respected and never being talked down to as a result of their age. They affirmed why they were loyal clients of mine and it had nothing to do with age at all.

Think back to some of your last client meetings or consultations. If you're like most professionals, there are times when you really hit it off with a client or perspective client. Other times? Well, let's chalk them up to learning lessons. As seasoned professionals we each have unique and somewhat inherent selling and servicing styles. We tend to connect most with individuals that are like us. As one of the great business men of this century, Mark McCormack has often stated, if someone likes you, it's not a guarantee that they'll buy what you're selling, but if they don't like you, it's almost certain that they won't do business with you.

So how does one better connect with their clients and gain deeper rapport with each interaction? Try this three point system that my business coach, trained in Neuro Linguistic Programming imparted upon my interactions. Throughout the years I have taught this process to numerous financial professionals with ease of adaptation and maximum effectiveness. The following is a beginners guide to the process.

Step one: Words. What you say is certainly not the most important element in your interactions, but it can build or break rapport instantly! There are three main modalities: visual, auditory and kinesthetic. Visual uses predicates such as, see, clear, and bright. Listen for clues as to what your natural style is and that of your clients'. Auditory refers to hearing and some predicates are 'ringing true', 'clear as a bell' and 'sounds good to me'. Kinesthetic refers to feelings. Be aware of statements like, 'mulling it over', 'feeling right or wrong' and 'I just can't stomach that'. Everyone utilizes all three modalities within their communication arsenal, but most lean towards one as a dominant modality.

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Step two: Our body. According to Professor Albert Mehrabian, a pioneer in understanding communications models since the 1960's, this is the most important element in building rapport. Mehrabian's model suggests that in the communication process, 7% of meaning is in the words that are spoken, 38% is paralinguistic (the way it's said) and 55% of meaning is in facial expressions and body language. One simple rapport building technique is to be aware of your spine tilt. If your client is laid back and relaxed, having you move in close and lean drastically forward could break rapport. Conversely, if you leaned back and folded your arms, it could be thought of as shutting off or closing the meeting. Be aware the next time you are conversing with your spouse or friends. If you're in agreement and alignment, you're likely sitting in a similar way. Try simple mirroring techniques with your clients to gain perspective of what they might be thinking or feeling.

Step three: Speed of speech. Each predicate as stated in step one has a normal speed of speech. Someone who is quite visual or in a visual mode, tends to speak rather quickly. Typically, auditory is the next slowest rate of speech and kinesthetic the slowest and most methodical. If you're a visual person for example, and encounter a kinesthetic thinker, slow your rate of speaking and allow the other person to take time to verbalizing their thoughts.

Although these steps just touch on rapport building skills, they give you a good start to being more aware of how to positively impact your interactions with your elder clients. You've likely also noticed that you're naturally following most, if not all of the steps that I've covered, but perhaps inconsistently. There's a specific recipe for rapport building and it starts with the three instant rapport builders outlined. Follow them carefully and enjoy the successes of communicating more effectively with your elder clients and everyone you meet.

Kelley Keehn, lecturer, business coach and author of *The Prosperity Factor*, uncovers the "inner games" we play surrounding wealth. In her book and courses, Kelley teaches individuals and financial professionals how to solve their money problems with a two-part system. First, an introspective look at how a person views money and their emotional attitudes towards it. Secondly, she takes readers and course participants through a series of fun and effective money and banking games that can be played for a lifetime of financial ease. For more information, visit Kelley at www.TheProsperityFactor.com or call her at 1 877 488.8760. Watch for Kelley's upcoming books to be released in early 2006; *The Woman's Guide to Money & Mutual Fundamentals*, co-authored with Jim Yih.