

Sample Client Conversations

(SCARY MARKETS)

During our March 26 Live Office Call with Stephanie Bogan and Carl Richards, the below talking points and conversation tips were covered:

WHEN YOU HAVE TO CHANGE THE PLAN:

"I understand that you are upset right now, maybe you are even mad at me. If we need to, we can go outside and throw a couple rounds." [Say with a smile if it feels right, decide how direct you need to be but then shift into strong leadership role.] "But we need to figure this out and I am here. Look, there is no one on the planet right now who can better help you deal with this. You, my friend, are coming with me. We are in turbulent air and you and I are in the cockpit together. Let's figure this out."

Remember, you are not defending the map; you are the guide in the changing landscape. Don't get defensive. Allow them to vent a bit but then get after it. Let them know you really are confident in your ability to guide them through this.

TO HELP WITH MAJOR LIFE/EMPLOYMENT DISRUPTION:

"What are going to do is take a step. We are going to have a thoughtful opinion, loosely held. We will act on it, and then new information will become available. We are going to take a step, then we will have new information, then we will take the next step after that. This is how we are going to make a plan."

Then figure out what the "triggers" are, the details that need to change before you check in again or change direction. Help the clients figure out what those are as a touchstone so they know when to contact you again.

ACKNOWLEDGING STRESS DURING CLIENT MEETINGS:

"How are you? But I mean, how are you really? Can we just acknowledge this is hard right now? I have an agenda for today's meeting, but let's just see how we are actually doing first." Then you can bridge after reassurance: "Let's talk about that after we get through the agenda today."

Or, if they are below the line, you need to address their anxiety before diving in, or they won't be able to focus on the agenda. If the unwinding needs to happen at the beginning, that's the highest impact activity that needs to happen in that meeting.