Transcription details:

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| Date: | 18-Jun-2018 |
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| MATT OECHSLI  | Elite advisors are phenomenal listeners and, you know, we have taken what elite advisors do and we call it the three Cs of communication. You know, that they're concise. They don't talk too much. They're not long-winded, talking about themselves. They're conversational. They're not arrogant, telling you how great they are, or acting like they have the answer for everything in the world. And they do it with confidence, but a relaxed confidence. And another thing that elite advisors excel in are asking questions. You know, and they understand how to ask questions in a casual conversational tone. Not as an inquisition. And then they're good listeners to the response. And by the way, you know, when you listen to somebody answer a question - this is whether it's a client, or you're out there socially interacting with a potential prospect. You know, when a prospect typically asks an advisor, "What do you do for a living?" An advisor then regurgitates their value proposition, which often sounds like the financial pledge of allegiance, because you're trying to come across so smart, so intelligent. This is all counterintuitive, but that's precisely the wrong thing they should do. |
|  | They should just be very humble about it. You know, we handle the finances for some families here in the area. And then they redirect by asking a question to the other individual, you know, such as, "How did you get involved with this fundraiser?" And then they listen to the response. And when they listen and then ask a follow-up question, follow-up questions are the key to developing rapport and credibility because they signal that A, you're listening. B, that you care about what you're hearing. And then C, you're interested in hearing more. People like that. |