

## The Client Attraction Conversation

By Norm Trainor

*The following is based on one of Norm Trainor's clients. All of the names and telling details have been changed.*

There is an art to attracting clients. You can utilize a simple framework for structuring client attraction conversations. My friend and colleague, Bill Whitley says: *"If you know how to open, you don't have to close."* Your Client Attraction Conversation takes place in the first few minutes of a meeting with a prospective client. The structure of the opening of an interview is *You/Me/Us/We*.

**You** — The first principle of engagement is to focus on the other person. You engage your prospective client by asking questions and listening. The more you know about them before you meet, the easier it is to ask questions that are very relevant and cause them to think about and expand upon subjects of real interest. A few years ago, I was introduced to the President of a large financial institution. His three children were the same age as mine. I learned that his oldest son was 21, living and working in Dublin, Ireland as a bartender. He left university after his second year to travel the world. I was born in Ireland. When we met, I said: *"I understand that your son is living and working in Dublin."* He looked at me and smiled ruefully. *"You know how to bring up painful subjects."* I also smiled and said: *"That would not be your choice at this stage in his life."* We then entered into a dialogue about the choices our children make and, sometimes, how difficult that is for us as parents. In those few minutes, we forged a bond as two fathers. In the initial few minutes, the intent is to establish rapport. The definition of rapport includes to act in harmony, to act in accord. It is important to create rapport as a way of earning the right to proceed to your business agenda.

**Me** — The Me is your transition statement to describe your purpose in being here. *"My purpose in being here is to earn the right to be your advisor. Most of our work is with people in your situation."*

**Us** — Then, you move into the Us phase by saying something like, *"Let me give you an example."* At this point, you describe in a story a problem that you solved for a client. Obviously, the more the person to whom you are speaking projects himself into the story, the more credibility you will establish. In the story, you illustrate how you work with people in situations similar to your prospective client. The primary motivation is to avoid loss. One of the best ways to create interest in what you do is to expose a loss in the other person's current situation. My friend and mentor, David Cowper, was a master at telling stories that engaged prospective clients. David worked with business owners. He knew that business owners want to reduce taxes and maximize the gains in their business. He presented the following concept through a simple story. *"Mr. \_\_\_\_\_ we work with successful business owners like you to find ways to reduce taxes and increase the value of your business. Let me give you an example. One of our clients has built a very successful manufacturing company. Working with his accounting firm and his other trusted advisors we were able to apply four Ds to significantly reduce his tax exposure, while growing the value of the business."*

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*The four Ds are Discount, Divide, Defer and Deduct. If we could show you a way to significantly reduce your taxes using this approach, would that be of interest to you?"*

**We** — The last sentence is the We in You/Me/Us/We. The intent in the Me/Us/We parts of a Client Attraction Conversation is to establish your competence and your positive intent to work with them to realize their goals.

You differentiate yourself through your understanding of your client, the questions you ask, the stories you tell, and what you are able to create together. In a few short minutes, the You/Me/Us/We framework enables you to establish credibility and earn the right to proceed to the next stage of the Buying Cycle.

**Norm Trainor is the founder of The Covenant Group, a company specializing in practice development for advisors. For further information, visit his Web site at [www.covenantgroup.com](http://www.covenantgroup.com).**