

# Top Producers Path to Gold

## How to Verify Your Client's (or Prospect's) Level of Satisfaction – Making Sure they are Committed

We all would agree that we are in a relationship business. Not only are personal and professional relationships the foundational joy of what we do, they can sustain our practice.

Our client's have choices, and we must earn their business every day. Dr. Leo Pusateri authored a four step model that can be adapted to our client meetings. By following the four steps in each meeting, we can go a long way toward achieving the highest level of satisfaction and commitment from our clients and prospects.

### STEP 1 - Revisit the Emotional Connection

Most all financial decisions are inherently emotional. When we acknowledge this and recognize the client's emotion, fear, concern or even

unfounded optimism, we are connecting with them at their most intimate level. Use phrases like "I appreciate the time and effort you took with this decision" or "I can understand why you would feel anxious given the importance of these decisions" in order to help demonstrate your empathy toward the client.

It is also important to note that financial decisions may be made solely with emotions or feelings. These decisions must then be justified by the client through rationalization and reason. This would explain why clients often follow a decision with a series of phone calls or questions to their Financial Advisor. Make sure that you honor and respect these post-sale inquiries as they are part of solidifying the connection with the client.

### STEP 2 - Display Confidence While Advising Clients and Prospects

Using positive language reinforces the "real value" you can add to the client even after the sale. In this stage, you clarify and confirm any agreements between you and the client so there are no

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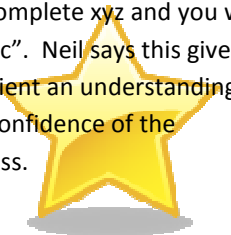
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## Top Producer Success Corner – Neil O'Connor, San Mateo CU

Neil has been extremely successful in maintaining and growing his book during turbulent markets. He and his team do this by reaffirming their client trust on a regular basis. Neil has increased the regularity of all of their reviews as well as maintaining constant contact with all clients. Neil also concludes

every appt with a summary of "Now before we meet next, I will complete xyz and you will do abc". Neil says this gives the client an understanding and confidence of the process.



Great Job Neil!

If you want to learn more about how to implement the strategy discussed, you can contact any one of the following GSG team members at 1-800-915-1004: Tom Ostrand, Reagan Grimes, Cynthia Pollard.

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misunderstandings in the future. Use phrases like "I am committed to helping you reach your objectives" or "To make sure that we are in agreement, I'd like to confirm our mutual commitments."

**STEP 3 - Summarize the Actions You Will Take**

This is the stage where you talk about the follow-up strategies. Confirm everything along the way, so that nothing is overlooked. Be specific about your understanding of what both you and the client agree to do. This is a good time to book the next meeting.

**STEP 4 - Express Your Appreciation**

Be sincere and genuine. Close every meeting with a statement like "It means a great deal to me that you are my client" or "I want you to know how much I appreciate your business. Thank You."

This simple acknowledgement goes a long way to building a relationship that will last a lifetime.

Talk with your GSG Program Manager about specific strategies to include these steps in your practice. ☞