The Power of You Client-Focused

An e-Guide from Bill Cates, CSP, CPAE

Research has found that there is a low correlation between client satisfaction and the giving of referrals. However, ***Engaged Clients*** can become great sources.

So, “What’s an engaged client?” you might ask. It’s a client with whom you’ve made both a Value Connection and a Human Connection. Allow me to explain.

You’re already doing this to a degree. I just want to raise your level of awareness with this important concept.

You make a ***Value Connection*** (provide value) through the questions you ask, the things you teach, your great advice, and responsive service.

You make a ***Human Connection*** through building rapport, finding things you have in common, hosting client-appreciation events, paying attention to things that are important to your clients that go beyond the core work that you do for them.

One of the fastest and most effective ways to create an engaged client – enhance the human connection – is to share your ***Client-Focused Why***.

Your Personal Why VS Your Client-Focused Why

Your ***Personal Why*** might be why you chose the business you're in – because of good income potential, flexible schedule, enjoying the work itself; things that are mostly about you; perhaps related to your bigger "life's purpose."

Your ***Client-Focused Why*** centers around the value you bring to your clients; more specifically, ***why*** you believe in your value.

Your Client-Focused Why can come from any number of sources and experiences. Perhaps you had something happy to yourself or a family member that made you choose your current profession. Perhaps you had an experience with one of your clients that drove home the value that you provide.

When you tell prospects and clients your Client-Focused Why, they lean into the conversation, because there's usually a bit of a story involved (keep it brief). People listen differently to stories. Your story just might be what creates that Human Connection that's so important.

Another benefit of you sharing your why, is that it gives your clients permission to tell you there's or to peel back another layer or two to go deeper into what motivates their decision making.

I recommend you bring this up with your prospects in the very first appointment, especially if that appointment is face to face. No need to wait. This might be what helps them decide to work with you.

Of course, you can tell your current clients if you haven't done so yet.

“I’d like to shift gears for a minute and tell you *why* I do what I do.”

“George, that’s a bit about *what* we do and *how* we do it. I’d like to shift gears for a minute and tell you *why* I do what I do; why I believe what I do is important.

“I’ve learned that, even with very smart and successful people such as yourself, things aren’t always clear and sometimes the confidence with respect to one’s financial situation isn’t as strong as one might like.

“I make sure that my clients become crystal clear on where they currently are financially and what they want their financial lives to look like down the road – their children’s education, their retirement, their legacy, their financial freedom.

“Together we identify the potential challenges and numerous opportunities, and with that we close the gap of clarity and confidence.

“My mission is to make sure that all of my clients are clear about where they are and where they want to be and then confident that they have the right plan for them in place to make that happen. And from that, comes peace of mind.”

“Your program has had a huge impact on our business. We have acquired 5 new clients worth $10 million. Results have been remarkable. I wish we had learned Bill's process sooner.”

Al Fox • Mt. Laurel, NJ

“I have been in business for 24 years and was never comfortable asking for the dreaded word: referrals. I now use your word crafting and it WORKS! I am having so much fun with this.”

Robin Wolff • Miami, FL