

## Title: Turn First Encounters into Follow-Up Conversations

When someone at a networking event discovers that you are an advisor, the person might respond: “Oh, you’re a financial advisor. So, what are you telling your clients right now?”

How would you answer? Might it lead to interest in a follow-up conversation?

Let’s compare two potential responses.

1. “Our clients are not worried about current volatility because they’re well-diversified and in it for the long-term.” BO-RING. Not likely to result in a follow-up conversation, is it?

How about this one?

2. “We believe noise is often confused with signals.” That’s more like it. It kindles some curiosity, doesn’t it? We call this response an ism.

Isms represent your evergreen beliefs about what it takes for the types of clients you seek to serve to be successful in their financial lives. You likely have investment isms, planning isms and legacy isms.

Great isms have 4 key ingredients:

- They are timeless.
- They are pithy.
- They are sound bites.
- They connect the dots.

Connect the dots to what? Connect the dots to the advice you deliver to the clients you serve, and those you aspire to serve.

Once you develop your isms, start deploying them in all dimensions of conversations—including your first encounters.

When you pique someone’s interest to dive deeper, you have made that first encounter count as they request a follow-up conversation with you.

- End of Recording -

## DISCLOSURE

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