

## **What Is It That You Do?**

*by C. Richard Weylman, CSP, CPAE*

One great frustration in the prospecting process is becoming comfortable with letting people you meet know what you do for a living. Over the years, as I've spoken at company and industry events, many financial services professionals have expressed their confusion and concern about how to approach people and what to say to them. Some feel they shouldn't bring it up until they're asked; others feel that if they bring it up, they will be seen as pushy. The apparent reason for this ongoing debate is a lack of rapport-building skills and self-confidence about your chosen occupation and its value to others.

Use these strategies to gain the confidence and skills to let the people you meet in a business or social setting know what you do for a living:

1. Make a list of all the reasons why financial planning is so important. The purpose of this list is to get you focused on the benefits and to give you some internal motivation.
2. Ask the centers of influence (the presidents, executive directors, clients, etc.) in the markets that you have chosen to suggest how you could best approach individuals about what you do for a living. Ask for specific direction here, even down to the phrases that they would use.
3. Schedule some time with your manager and ask him to tell you specifically the words he uses to tell others what he does for a living. Be sure your manager gives you the specific words that he uses. Write those words down so you can adapt them to your own use.
4. Role-play with your manager and colleagues so that you hone and sharpen your skill at bringing up what you do in a non-threatening way. It's important to create an environment as close as possible to a real situation. Perhaps you could sit down at the conference room table and have four or five of your colleagues sit with you as if you were having a meal at a function that your target market is putting on. Turn to the person on your left and the person on your right and simply say, "I've certainly enjoyed talking with you again. We've seen each other over the last several months at these meetings, and I would be delighted to have an

opportunity to get together with you sometime during the next month and hear more about your business and to tell you more about some of the things that I'm doing to help people in the industry achieve financial well-being." Then ask for the appointment, "Is there a particular day of the month that would work for you?" Then quietly listen to what the individual has to say. In most cases, they'll respond favorably. As you role-play this, have your day planner ready just as you would at the function. Use your day planner as you would in real life so you actually practice the process.

5. Work on your rapport-building skills. Often you find yourself in a situation where you're not sitting next to someone at a meeting and, therefore, you don't have the ability to establish a sense of relationship over a meal or during the meeting. Many times you may be standing in a crowd at the hors d'oeuvre table or the registration desk where you're unsure of how to proceed. George Walther, a good friend of mine and the author of *Phone Power* says, "Stand shoulder to shoulder with someone as you watch an event or before a meeting begins. Lean in and make a comment on the program or ask a question about the other individual, then introduce yourself." Undoubtedly, one of the best ways to mingle and to establish rapport is to ask a question and make a positive comment. This interaction almost always leads to introductions which present you with a golden opportunity to not only tell people what you do, but to make it interesting.

As you develop the words that you will use and the way that you will approach prospects, keep in mind these three things:

1. Let prospects know your intent while making it clear you enjoy working with people like them. It's not necessary to blatantly say, "I'm here to sell you." But do let them know you're a resource.
2. Avoid being coy and thereby harming trust and credibility. Be forthright and forthcoming so that you avoid getting the reputation that you are simply using the group.
3. Let them know you're there because you have an affinity to the organization and that they are the type of people you choose to do business with and wish to serve. By having a well-

though-out brief commercial about what you do and how it will help the prospect, any skepticism about your intent will be overcome by your professionalism.

C. Richard Weylman is an expert in marketing, selling and communicating to affluent and high net worth people. He is the author of "Opening Closed Doors, Keys To Reaching Hard-to-Reach People," as well as numerous sales, relationship and marketing and management audio and video education programs. To discover the many resources he has to offer you and your organization, including his speaking topics, free weekly marketing tips (emailed to you), free articles and much more, go to [www.richardweylman.com](http://www.richardweylman.com) or call 1-800-535-4332 to schedule Richard to speak at your next event.

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