



AQUILA
GROUP OF FUNDS®

COMMUNICATING WITH EASE

How can you communicate with ease and strengthen your bond with your clients?

1. Focus on the client, NOT yourself.

- Platinum rule: “do onto others as they want to be done unto”. What you say must be compelling to them, so you need to think about their concerns. What do they care about most?
- “Seek first to understand and then to be understood.” *Stephen Covey*
- Ask open-ended, thought provoking questions about their dreams and goals.
- Actively listen to, and learn about, your client.
- “No one cares how much you know until they know how much you care.”

2. Understand differences in behavioral style.

- Styles are often revealed by body language, tone, and pace, as well as words.
- Observe and match your client’s style.
- Some clients are fast paced, while others are slower-paced.
- Some want interpersonal interaction, while others prefer to work independently and be left alone.
- Some use logic and a thoughtful, deliberate process, while others like flexibility and change.

3. Understand the importance of differing values.

- Values dictate what we care about and the decisions we make.
- Refrain from assuming that your own values are shared by your clients.
- Probe and learn what matters to your clients.
- Make financial recommendations based on their values, not solely on investment returns.

4. Drop any assumptions you hold about why the client is who they are, why they do what they do, and how much they understand about what you do.

- Don’t assume they understand what you’re presenting.
- Help them to learn - explain concepts without using jargon.
- Don’t generalize or categorize.
- Repeat and paraphrase for understanding and agreement.
- Watch, listen and learn.

5. Always put the client first in all communications.

- Personal trust is the key to building long-lasting relationships.
- You must convey, in all client interactions, that there is nothing more important to you than providing objective information while meeting the client’s needs.
- You should be pro-active and communicate with clients frequently.
- Use multiple forms of communication – phone, hand-written notes, letters, and email – unless the client has clearly expressed a preferred communication method.

Practice these communication skills every day until they become habits.