

# **BEST MARKETING IDEAS FOR NOW**

## **Transitioning from Social to Professional**

Many advisors tell me they don't know how to convert a social conversation to a professional one. Managers share stories of agents who meet people in casual social settings and never seem to be able to move the relationship further.

Being a good conversationalist is a critical skill if you're in the people business. When you accidentally find yourself speaking to an interesting, successful person at a social event, you need to be graceful. I've conducted a number of role playing sessions where the advisors practice being at a social event and try to set up a coffee appointment. They're surprised at how difficult it seems, but I now know why.

Financial professionals sometimes share their passions and enthusiasm at the wrong time. If someone inadvertently tells you something about their financial life, be careful. Many years ago, my dear friend Andrea Nierenberg, taught me "***Don't pounce.***" I repeat her wise words constantly.

Let's say you meet someone at a party and the two of you "click. It's quite natural to ask that other person about their work life. You can easily get someone to talk about themselves for a long time if you are genuinely interested and do not interrogate them. You also need to remember when to stop the conversation and suggest that you continue it at another time. It would be at this juncture that you would suggest meeting for coffee next week.

Sometimes, newer advisors get "stuck" when they're trying to find out about someone's life. If your motives are pure - i.e. you are just interested in that person without an ulterior motive - you probably can get someone to talk forever. Everyone loves to talk about themselves and a business person or professional who loves their work will keep talking as long as you ask questions. I know because I do it *all the time*. I am genuinely interested in other people's careers so I find it easy to get a lot of information about them. If you learn how to sequence your questions, you'll get TONS of information.

So how do you "transition" from a chatty social conversation to a coffee appointment? Here's what you need to know about conversations: If you keep questioning someone, they will keep talking. If you stop asking questions after 20, 30 minutes, they will realize THEY'VE been doing all the talking and will turn to you and say "And what do you do?"

Here's where you have to be good on your feet. You need to take the information you've learned about the other person *and share your profession in a way that will matter to them*. I suggest you start with this sentence:

***You know when you said.....?***

KEEP IT SHORT!! No monologue-ing, no teaching, no presenting complex ideas.

Example: You're with a business person and you find out that they have a lot of employee turnover. Your answer might be "***You know when you said you have a lot of turnover in your business? Well, I help small business owners like you to give good employees a reason to stay.***"

See? Short and simple with a benefit.

If the other person shows more interest, that's good. Then it's time to say that both of you are probably being bad guests and should continue the conversation in another venue. Then say, "***What's a good time to meet for coffee or lunch next week?***"

Now pull out your phone. Use your calendar and set the appointment. Make sure to get the person's name, phone number, etc. in **your** phone and then text them your contact information- right then and there.

If you practice talking to people and getting them to talk about themselves, you'll find it easier and easier to get information. Remember, not everyone you meet will be someone you want to pursue a relationship with, so be a good guest and chat with lots of people. You're not there to "find prospects" but if someone intrigues you, then you can take it to another level and continue to learn who they are.

***Words Matter!***

Gail

I thought these Shocking Statistics were important enough to replace my usual quotes. Look for these every month in my 2017 newsletters.

**The average voicemail response rate is 4.8%. (InsideSales)**