

Silent, Incisive Questions & Client Stories
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*When you generate people's trust, they hand you their stories.
When people tell you their stories, they hand you their trust.*

Our clients' stories are vital to the integrity of the plan we create for them, and to the longevity of their relationship with us.

Silent Incisive Questions And The Client's Stories

What makes people tell us their stories?

The question is not: What makes people talk? People will talk. People will talk even when they are frightened. Talking is not the point.

The question is: What makes people tell us what is in their hearts? What makes people tell us the stories that are shaping their lives, the stories that tell us what the best plan will be for them.

When a client comes through our office door, we shake hands with not just with a person, but also with thousands of stories.

Why do we want our clients' stories? Because their stories are the clues to creating with them the perfect plan and legacy. Their stories are who they are. So we must invite the stories in.

Some of their stories show up immediately - on their faces, in their eyes, in their handshake, in the way they sit in their chair, in the clothes they wear. But most of their stories need an invitation to join us.

ASSUMPTIONS

What keeps the stories inside? Why do they need a special invitation to emerge?

Because along side the stories in our clients live untrue assumptions about their stories, about themselves, and about the very process of telling their stories. Some of these assumptions are:

1. My adviser does not want to hear my stories; they are an indulgence and are irrelevant to the planning process.
2. My stories are boring.
3. My stories will reduce my adviser's respect for me.
4. If I tell my stories, I might have lots of feelings, I might even cry, and that is a sign of weakness.
5. No one has stories as disturbing as mine.
6. My stories don't matter here.

ATTENTION

In order for our clients to tell us the stories that are our clues to perfect planning and legacy for them, we have to remove those assumptions. We do this, not directly. We do this with extraordinary Attention for them from the first minute. Through this Attention we are asking them these silent Incisive Questions:

1. If you knew that your stories that reveal who you uniquely are, are essential to our creating the perfect plan and legacy for you, what stories would you tell me about yourself?
2. If you knew that your stories, all of them, are fascinating and interesting to me, how would you feel while telling me?

3. If you knew that I will respect you more because of the stories you tell me about who you are, what story do you know you most need to tell me?
4. If you knew that I know that stories are full of feeling and that feeling is full of intelligence, what stories would you not avoid?
5. If you knew that there are stories far more alarming than yours, what difficult story would you tell me that will help us with your plan and legacy?

Those are the silent Incisive Questions that are implicit in our behavior with our clients, from the minute they come through the door. We produce these silent Incisive Questions by doing these things:

1. First, we connect with the client, with our eyes, with our warm tone.
2. Next, we tell them the story of our Process.
3. We give them the Information that their authentic stories, regardless of what they are, are 1) the best route to the clues for perfect planning; 2) will only increase our respect for them.
4. We promise them we will not interrupt them as they speak.
5. We ask them questions that get them to focus on the relevant stories.
6. We hush the clock in our heads and the internal clacking of document templates.
7. We give them the highest quality Attention throughout, keeping our eyes on their eyes, maintaining a face and internal attitude of acceptance, composure, and deep interest; never shock or judgment or distance.
8. We make certain not to take notes, nor to stop or interrupt them, even for clarification.
9. We ask, when they say they are finished, "What more would you like to add or to say? And we give the same level of Attention while they think and speak next.
10. We appreciate them during the session.

These behaviors keep them finding and telling their stories.

Most powerfully of all we give them Attention. We offer Attention unlike any they have ever had.

Soon, stories peek out between the curtains, scanning us with one eye at first. Checking out the quality and authenticity of this listening. And when they see that it is safe, when they notice the sincerity, and trust the promise of no interruption, when they feel our interest, they throw open the curtain, and dance.

And we are on our way to constructing the plan most expressive of our clients. And our clients are on their way to describing us to their friends and colleagues as the best planner on the planet.

Link to original article on Advisor Blog Central:

<http://kline.advisorblogcentral.com/post/2008/05/Silent2c-Incisive-Questions-And-Client-Stories.aspx>