



2020 Advisory Conference

October 27–29

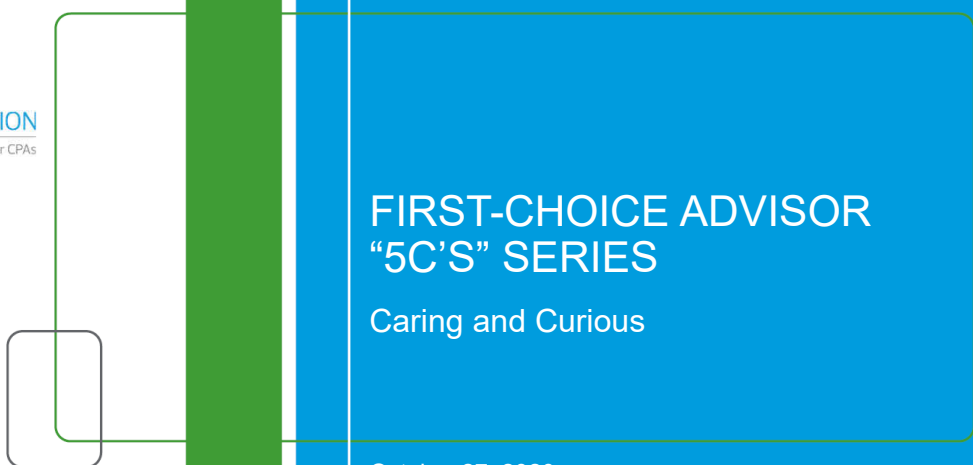
Converging knowledge and behaviors to deepen client relationships

CONVERGE

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**FIRST-CHOICE ADVISOR
“5C’S” SERIES**

Caring and Curious

October 27, 2020

Speaker



Pat Nunley

Director

RSM US LLP

First-Choice Advisor Center

Dallas, Texas



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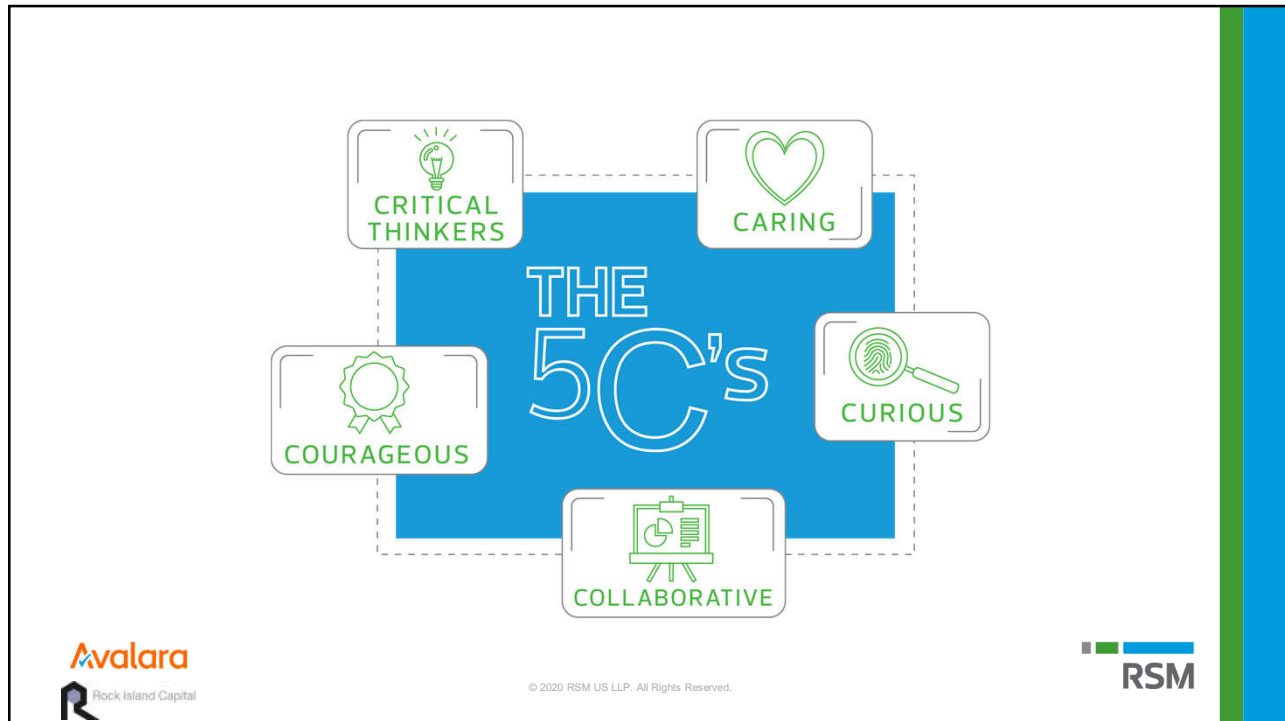
Agenda

Topic	Minutes
Location, location, location	10
Curious	25
Caring	25



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Objectives

By the end of this course, you will be able to:


- Intentionally create experiences with clients that make it crystal clear – “you are in it for the relationship and care”
- Engage clients in insightful dialogue that draws them in and “sparks” innovation

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LOCATION, LOCATION, LOCATION

Above or Below the Line

Locating yourself




**OPEN
CURIOUS
COMMITTED TO LEARNING**




WHERE AM I?

**COMMITTED TO BEING RIGHT
DEFENSIVE
CLOSED**




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Locating Yourself - A Key to Conscious Leadership

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Locating yourself



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Dr. Henry Cloud,
Integrity

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“

People feel cared about, and **trust is built**, when they know that we have a genuine interest in knowing them, knowing about them, and having what we know matter.

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CURIOUS

Sparking the Spark



What is curiosity?

- **Curiosity** is the state of being **curious**: inquisitive, wondering, ready to poke around and figure something out.
- **Curiosity** is the difference between what you know and what you want to know.

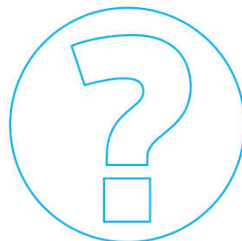


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Did you know...

- Children ask approximately **200+** questions per day.
- Adults ask about **20+** questions per day.



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Data on this slide from Jeffrey Proud, Ph.D Educational Administration and Management & Group Dynamics, Motivation Theory, Game Theory, February 2019



Curious people

- Ask lots of **great** questions. ...
- Seek surprise. ...
- Are fully present. ...
- Are willing to be wrong. ...
- Make time for curiosity. ...
- Aren't afraid to say, "I don't know." ...
- Don't let past hurts affect their future.

Fast company



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THINK
about it


How can you spark your curiosity
about your clients?



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OPEN ENDED


CLOSED ENDED

HIGH GAIN

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OPEN ENDED


IS A QUESTION THAT...

PRIMARILY USED WHEN TRYING TO...

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CLOSED ENDED


IS A QUESTION THAT...

PRIMARILY USED WHEN TRYING TO...

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HIGH GAIN

IS A QUESTION THAT...

PRIMARILY USED WHEN TRYING TO...

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What makes a question high gain?

1. High level...3 levels deep
2. Evokes an emotional response
 - Speculate
 - Express concern
 - Express opinion
 - Compare
 - Declare criteria
3. Only they can answer it
4. Relevant
5. Get credit for it



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What do you wish we knew about you that we probably don't know?

What must happen for your company in the next 6 months to give it the greatest chance of achieving explosive growth?

What would your best customers say is the reason that they enjoy doing business with you?

If you were to guide us to play a more impactful role for you, what would you guide us to do?

What is different about your company today from when you started with the company?

Could you share with us the qualities that differentiate you from your top competitors?

What are the opportunities for improvement that would unlock the highest value for your company?




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CARING


Getting to the Heart





What is caring?


- **Caring** is feeling and exhibiting concern and empathy. Thinking about what other people need or want and trying to help them....learn more.

“We build strong long-term relationships by **understanding others** and their aspirations, and remaining empathetic to their unique challenges, needs and preferences.”

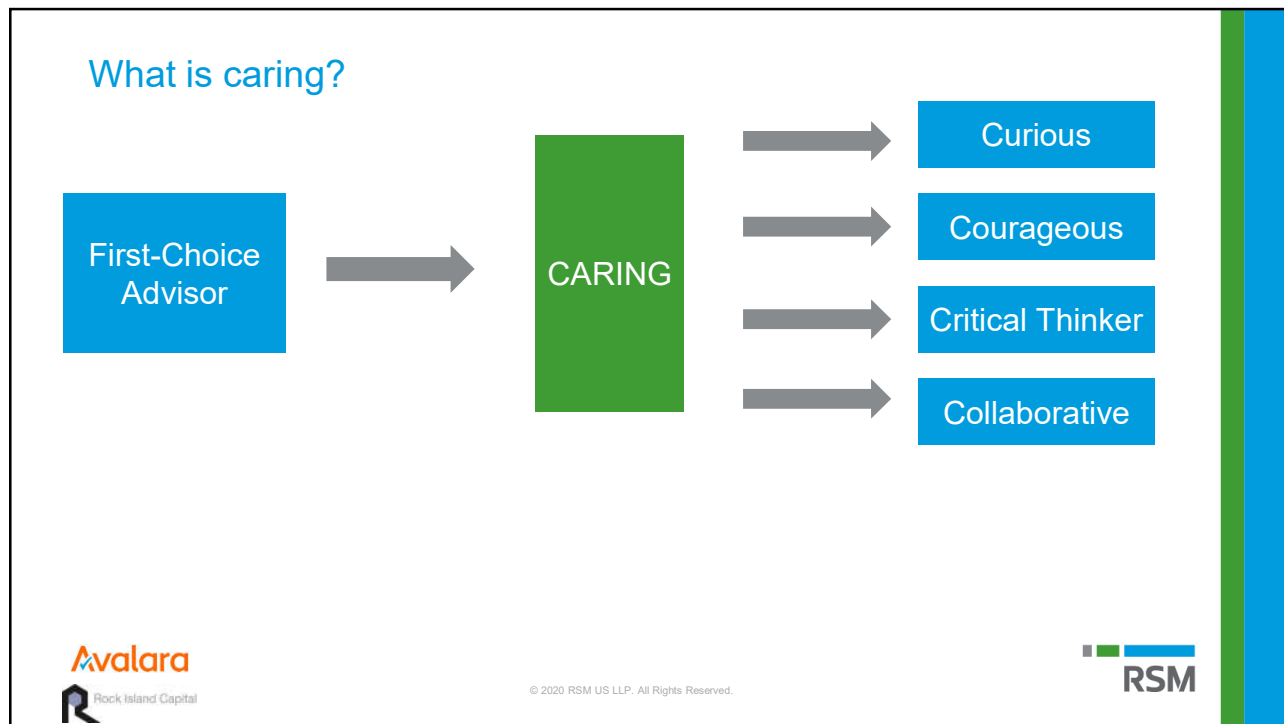


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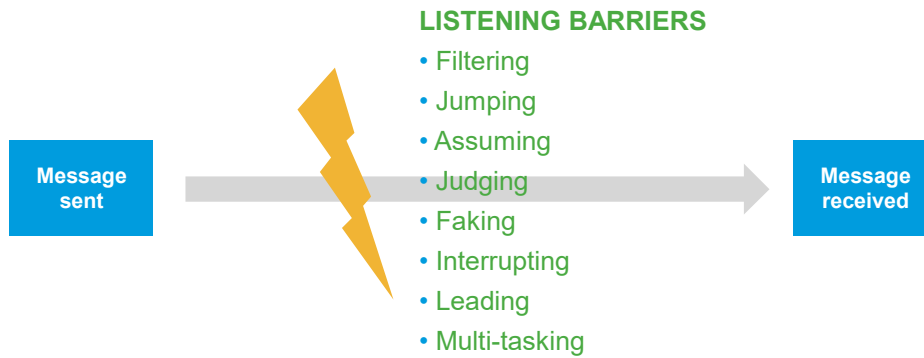


THINK
about it

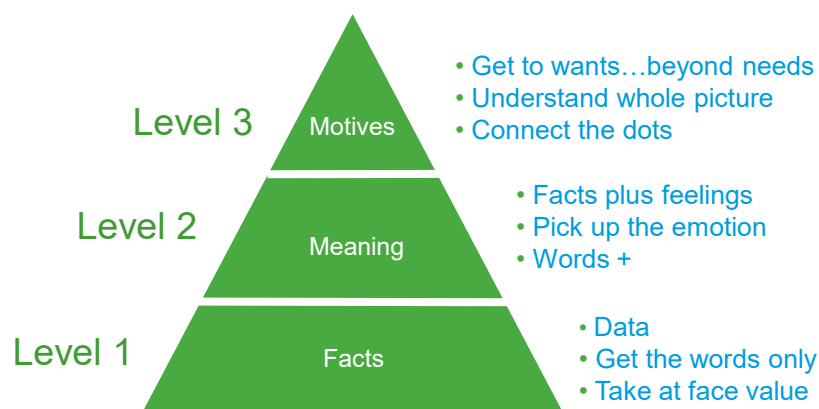
How do we best exhibit empathy?

This slide features a blue box on the left with the text 'THINK about it' in white. To the right of the box is the question 'How do we best exhibit empathy?' in blue text. The slide includes the Avalara and Rock Island Capital logos in the bottom left, a copyright notice '© 2020 RSM US LLP. All Rights Reserved.' in the bottom center, and the RSM logo in the bottom right.

Barriers to listening



Listening levels



Utilizing nuggets to make a difference



Use **NUGGETS** to invest in and intentionally **GROW** relationships.



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Utilizing nuggets to make a difference

Nugget worksheet

KEY CONTACT	MAKE INTRODUCTION	DELIVER IDEA	CREATE ENJOYMENT	BE A SOUNDING BOARD	SOLVE PROBLEM	PROVIDE ENCOURAGEMENT
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Utilizing nuggets to make a difference

KEY CONTACT	MAKE INTRODUCTION	DELIVER IDEA	CREATE ENJOYMENT	BE A SOUNDING BOARD	SOLVE PROBLEM	PROVIDE ENCOURAGEMENT
Mike at Destiny	Introduce to Brent Smith		Invite to Firm event			
Phil at Global, Inc.		Send F&B Report & statistics				
Sara at Precept Sales				Take time to discuss career options		



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Utilizing nuggets to make a difference

EXERCISE:

- Individually: List your key client contacts, internal and external relationships on the left hand side of the chart.
- For each contact, check one or two boxes that correspond to a valuable nugget you will plan to deliver over the next 30 days.

KEY CONTACT	MAKE INTRODUCTION	DELIVER IDEA	CREATE ENJOYMENT	BE A SOUNDING BOARD	SOLVE PROBLEM	PROVIDE ENCOURAGEMENT
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Application challenge



On-Your-Own Assignment

- Select 1 of your STAKEHOLDER RELATIONSHIPS to focus on.
 - Over the next 30 days, be intentional to
 - Ask high gain questions
 - Listen at the 3rd level more
 - Deliver nuggets



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