



2020 Advisory Conference

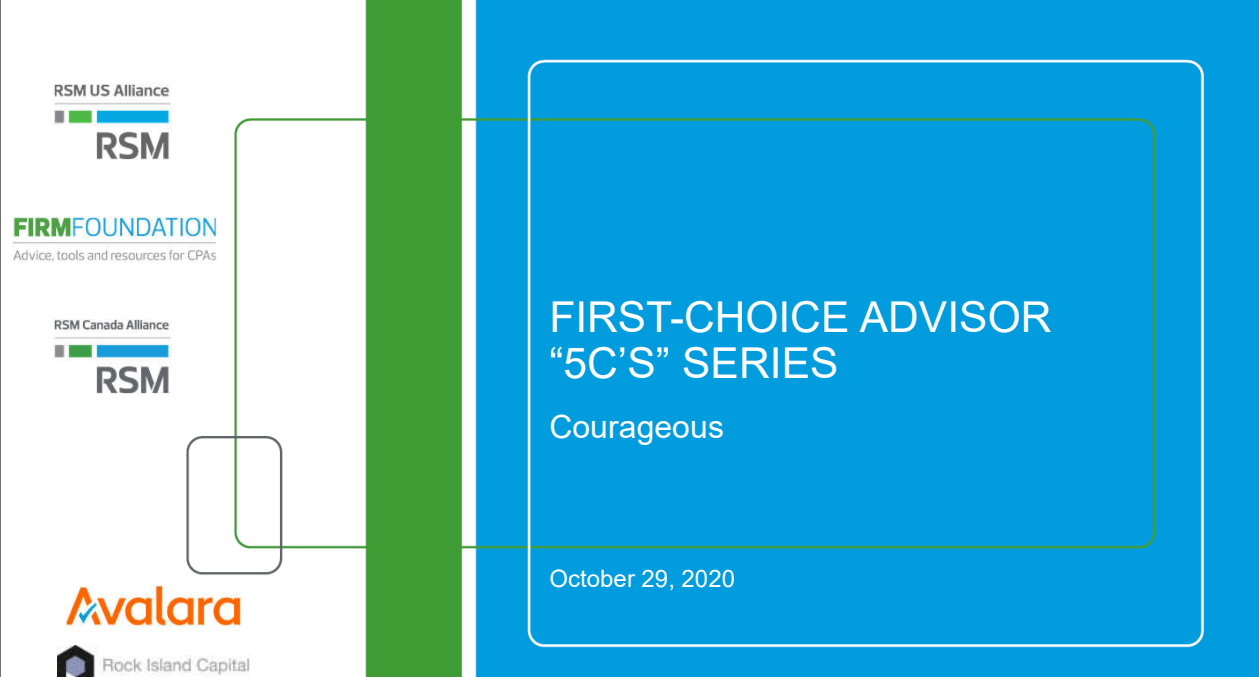
October 27–29

Converging knowledge and behaviors to deepen client relationships

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FIRST-CHOICE ADVISOR “5C’S” SERIES

Courageous

October 29, 2020

Speaker



Pat Nunley

Director

RSM US LLP

First-Choice Advisor Center

Dallas, Texas



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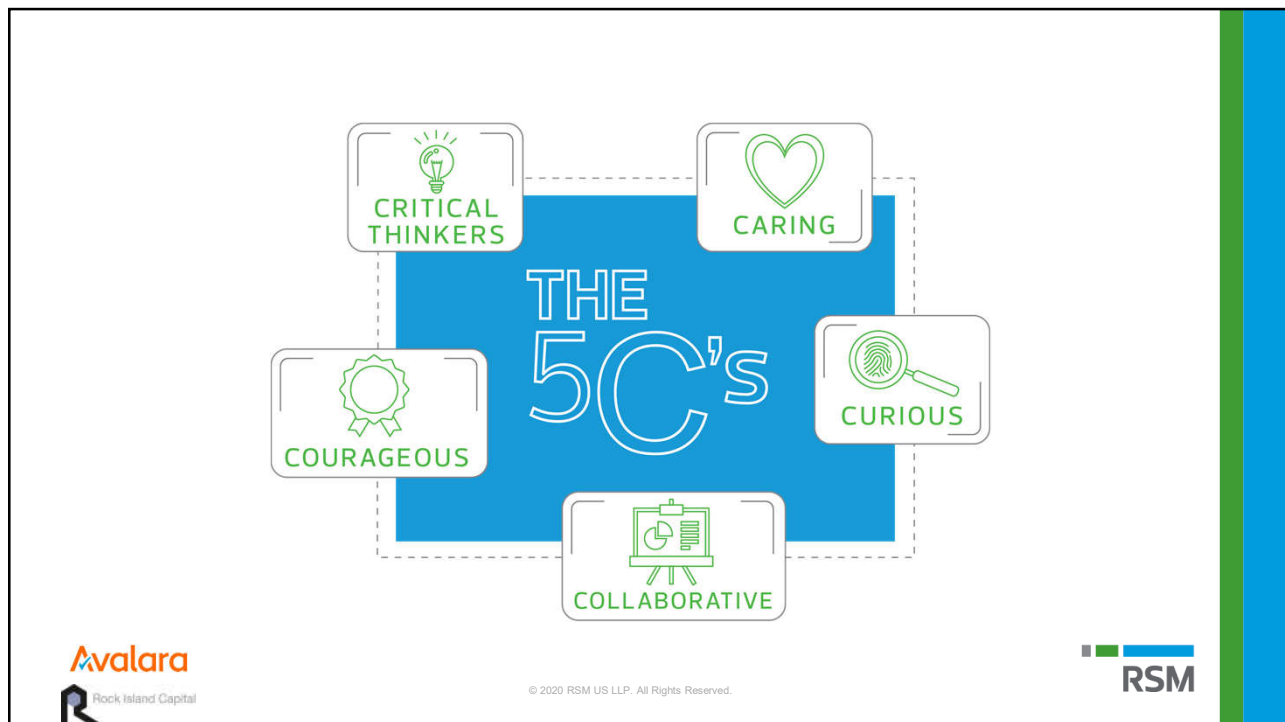
Agenda

Topic	Minutes
Courageous	60



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Objectives

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


- Gain skills and confidence to exhibit boldness in key moments interacting with clients
- Guide clients to an outcome that provides a “win” for both sides

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COURAGEOUS

Achieving Win-Win



THINK

about it

Why is it important for an advisor to be courageous?

Who do you know professionally that “lives out” being courageous?

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THINK
about it

What is the impact of courage
(or lack thereof) on your
trustworthiness?



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$$T = \frac{C + R + I}{S^o}$$

T = Trustworthiness

C = Credibility

R = Reliability

I = Intimacy

S^o = Self Orientation

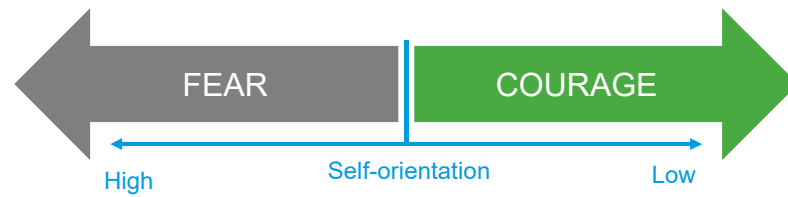
Adapted from – “The Trusted Advisor Fieldbook” – Charles H. Green



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Courageous advisor

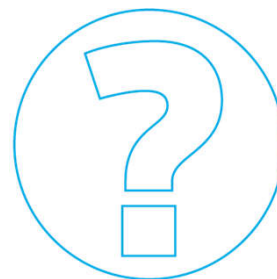


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Pinches

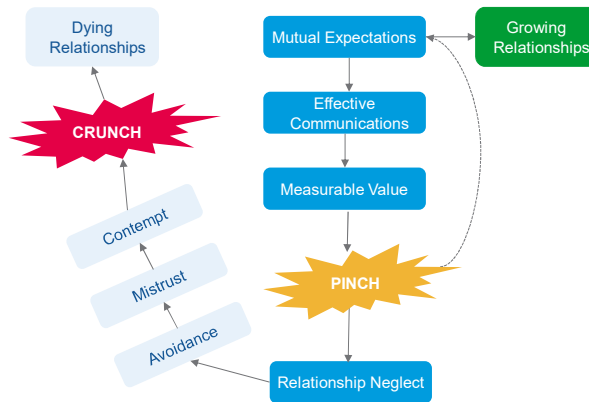
What are some examples of relationship pinches that you tend to experience?



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Pinch model



Establish a PACT

P A C T	<p>▪ ALIGNMENT: What synergies can we create by aligning with your people and priorities?</p>	
	<p>▪ ANTICIPATION: In what areas would it be valuable for us to look ahead and/or provide proactive advice?</p>	
	<p>▪ ADDING VALUE: In what ways can we be a strategic partner to you – making a true difference?</p>	

THINK
about it

Are you encouraging
or discouraging?



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The 5C's



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



We **ask probing questions** and **seek diverse perspectives** to gain understanding, challenge thinking and generate new ideas.



We believe that collaboration leads to better outcomes, and we **seek and share perspectives to encourage innovative thinking** to solve problems and enable others to seize opportunities.



We demonstrate strength and confidence in **challenging traditional ways of thinking** – having the courage to look forward and prepare for tomorrow.



We synthesize, apply and communicate complex information and concepts with clarity, objectivity and depth, and **bring our best thinking and advice** to help others make confident decisions.



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Application challenge

On-Your-Own Assignment




- Select 1 of your STAKEHOLDER RELATIONSHIPS to focus on where you need to be more courageous.
 - Over the next 30 days, be intentional to:
 - Establish a PACT with them
 - Address PINCHES as they occur



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+1 800 537 7178

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