

2020 Advisory Conference

October 27-29

Converging knowledge and behaviors to deepen client relationships

First-Choice Advisor "5C's" Series: Caring and Curious

| Location, Location | NOTES: | |
|---|--------|--|
| OPEN CURIOUS COMMITTED TO LEARNING WHERE AM 1? COMMITTED TO BEING RIGHT DEFENSIVE CLOSED | | |

Curious

| NOTES: | |
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| | CURIOUS |
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Types of Questions

| | Open Ended | Closed Ended | High Gain |
|-------------------------------|------------|--------------|-----------|
| Is a question that | | | |
| Primarily used when trying to | | | |









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Caring

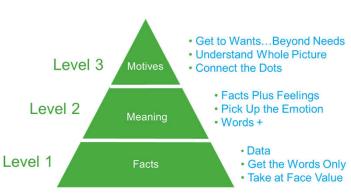


Barriers to Listening



NOTES:

Listening Levels

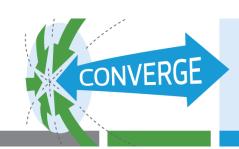


NOTES:









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Nugget Worksheet

Instructions:

- 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





