



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, Location



NOTES:

Curious

NOTES:



Types of Questions

	Open Ended	Closed Ended	High Gain
<i>Is a question that...</i>			
<i>Primarily used when trying to...</i>			



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Caring

NOTES:



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



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