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## Rising Above Today's Level Playing Field

Recent discussions with advisors and companies have centered on "how do we rise above the rest in today's environment?" It is clear that there has been an involuntarily level playing field set in place and the average are conducting the same activities with - no surprise - average results. When everyone is doing it, you set yourself up for the norm. Yuck...who needs that! Well, if you or your business possess the **MindSet** of being fully engaged, then this **3x3 Rise Above Tool Kit** is for you. This is designed with three directives that the best embrace...**Pre-Start, Educate and Connect.**

**3 PRE-STARTS** Being intentional and starting each workday with these pre-starts will set you up with renewed energy and perspective. This powerful routine will initiate that contagious person you are for your clients and prospects.

### Ready Your MindSet

Set the stage for a great day ahead with an **Engaged MindSet**, vs the other three mindsets: autopilot, thinking or critical. Take time to get your emotion and energy engaged for your best day of business activity. Use trigger words, meditate, read something short and empowering, etc. Fill your **MindSet** engine with this fuel and then make your day happen.

### Show Gratitude

Saying "thank you" is a simple way to wipe the slate clean before your day begins. Saying "thank you" is a 2-for-1 gift of gratitude and forgiveness all wrapped in one. Saying or writing a short note of thanks is the turning point between letting go of what's happened and embracing what's to come. Start your morning with a "thank you" to a different person daily.

### Set Unplug Times

Yes, define your unplug time with **10 minutes of activity** that takes you to a non-tech and non-work environment. Take a short walk outside, listen to music, light a candle and reflect for 10 minutes quietly, etc. Activate these at the start of the day, middle of the day and at the end of your workday. This is free power for your vital focus.

**3 WAYS TO EDUCATE** Humans learn from all three, but have the highest degree of comprehension with one of the three below. Activate your listening and observation skills to best understand what your clients prefer.

### Visual

You have heard it.... "I see what you mean" or "Ah, now I see what you are talking about." These types of indicators confirm your client is visual and learns best with seeing the story, deck, brochure, financial plan with graphs, etc. Listen to how they respond to your delivery of information...you will hear the keys.

### Auditory / Vocal

"I hear what you are saying." "Can you tell me more about that?" "Discuss how this is important to me." These are the types of confirmation responses of clients' preferences for clearer learning and communication. Again, listen carefully and communicate more effectively with verbal impact as you hear the need.

### Kinesthetic /Feel

Clients learn by doing, touching or sensing. This can be witnessed by listening for phrases like: "I have a good feeling about this." "This does not feel right." "This feels really good for our future," etc. This can be the key difference in enlisting immediate trust or not.

**3 MUSTS FOR CLIENT CONNECTION** Ah, the Trifecta of connecting with clients and prospects. Adopt these key tactics and incorporate them into your future avenues of communication.

### Communicate

Clients and prospects **want to hear from you**. Remember, you manage their financial future on a few or many fronts. Creative handwritten notes are most meaningful to say hello, thank them, assure them, entice them, etc. They do not delete your emails, texts, voice messages or personal videos while their financial future is in your care. With timely handwritten notes, you can also inject the above tech avenues with a solid cadence.

### Engage

Center your communication around forming and maintaining authentic relationships. **Ask open-ended questions**, which is a low-effort tactic with big potential returns. Also emphasize your communication with the following themes:

- Provide them with \_\_\_\_\_
- Support them with \_\_\_\_\_
- Recognize them with \_\_\_\_\_
- Encourage them with \_\_\_\_\_
- Show care for them with \_\_\_\_\_
- Equip them with \_\_\_\_\_, Etc...

### Add Value

Build lasting brand loyalty, strengthen your sales machine, keep your clients engaged and ultimately better your bottom line by adding value at all times.

- Timely education on financial topics
- Simplify their complexity
- Invite to community related events
- Financial Ed sessions for their children
- Updates on their favorite hobbies
- Invite to topical presentations
- Etc...

**Those who say it can't be done are usually interrupted by others doing it.**