Building Trust

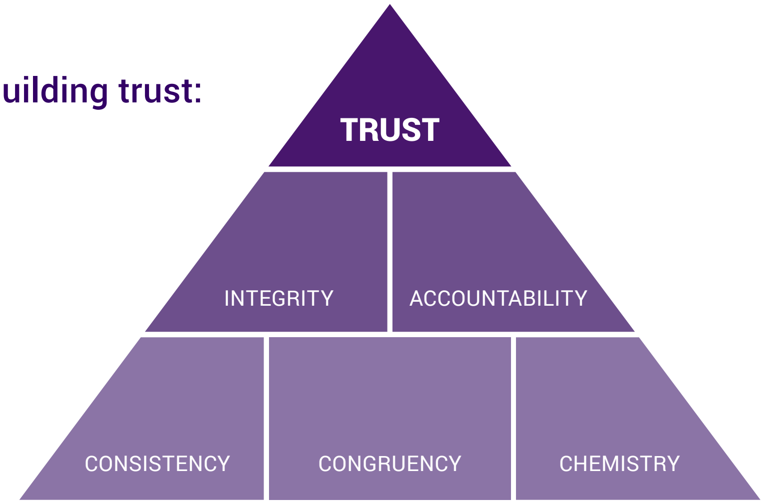
LIONSHARE

You are probably wondering: "How can I create trust quickly, efficiently and effortlessly, as well as sustain and expand the trust my clients have in me over the life of our relationship?"

The answer is simple. You need to create consistent experiences every time you or your staff interacts with a client or prospective client. In addition to providing competent and professional advice, you and your staff must create congruency in every aspect of your business.

There are five main components to building trust:

- *Consistency*
- *Congruency*
- *Chemistry*
- *Integrity*
- *Accountability*



To bring all five of these components to your financial advisory practice, you should analyze, design, and redesign every detail of every action within your system. Define everything. Create processes. This system must encompass all the activities within your organization. Be sure everyone in your organization follow these processes consistently.

Representatives of your practice include the principal Advisor(s), all associate members of the team, administrative assistants, and, ultimately, all clients and prospective clients. Clients and prospective clients become 'representatives' of the system as soon as they begin communicating your procedures and practices to others. The Partner Series will provide you with valuable information and talking points to help you communicate with your clients and help you better demonstrate your value.

If you allocate a proportionate amount of time in your business plan and in your systems to solidifying and strengthening trust, then your clients will begin to recommend you to friends, family and colleagues.

Understand the power of trust. Those who embrace and apply it to their practice management, and partner with professionals to support it, will survive. Those who don't will disappear. This is marketing integrity.

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