

How To Build A Client-Centric Business Approach Rooted In Authenticity



BY TANYA NICHOLS, CFP®

Transparency is the risk,
authenticity the currency,
and trust is the reward.

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In today's modern world,
connection and trust are
more important than ever.

As well as running Align Financial, I also love to pitch in and support my professional peers. I take pride in sharing my knowledge and expertise.

Through my consulting work especially, I've really had a chance to examine my own career and experiences. I've looked hard for the lessons learned along the way; those little details that have shaped both Align Financial and myself as an advisor and coach, and I've collected a few of those most important lessons for you here.

I truly believe that I owe my success to some simple factors and I'm pleased to be able to share them with you. This is my quickfire guide on how to nurture a client-centric business approach that's firmly rooted in authenticity and a genuine passion for being your client's best advocate.

Warmly,

Tanya Nichols

Tanya Nichols, CFP®

#1

You Don't Need A Sales Pitch

Let me tell you a quick story - it was probably my first and most important experience of working with clients.

I learned my most important lesson instantly.

I was working in a bank, and I was in a meeting with one of my very first prospective clients. I'd been trained by the bank in the way they sold their services to their customers, and so I headed into the pitch. I even used what we called a "Pitch Book" back then. It was so cliched. So impersonal. I felt so awkward that I started to giggle uncontrollably.

Right then, I realized that I would never make it as a sales person. This was not the intuitive way for me to work.

I recognized that I had to worry less about what I said and focus more on what the client was saying and what they needed. Our clients come to us for help and advice, often in a state of vulnerability - there's little room, and no use, for traditional 'selling' tactics.

That was one of my first meetings as an advisor and I have never forgotten that lesson.

Whenever a meeting goes sideways (personally or professionally), it's usually because I'm thinking more about myself than the other person.

Thankfully, and maybe a little surprisingly, that first prospective client is still a client today, many years later. Maybe through my giggles and visceral rejection of the sales pitch, she saw the real, authentic me and felt at ease.

#2

Show Me Your Calendar and I'll Show You What You Value

We spend a lot of time thinking about - and sometimes pining after - the elusive work/life balance. We often make sacrifices in one for the success of the other, then we torture ourselves about the other options that were available to us, but we didn't take.

I'm pleased to be able to share one of my most important work/life balance tips with you, and this isn't about surviving in one area while thriving in another. This is about nourishing both your professional and your personal lives, for the sake of the whole picture.

Create structure in a calendar that includes your professional and personal commitments. Honor them both.

Often in our work lives, we have loads of tasks building up - our "I'll get to that eventually" to-do list, the one that clutters up the back of your mind precisely because it hasn't found a place on the schedule yet.

I found that if it made it to my calendar, it actually happened. A client meeting or a staff meeting on the calendar was rarely going to get forgotten about or pushed endlessly back. So why not put the kids' school program or the bike ride with your friend, or a day to work from home on the calendar? These things could be just as important as that client meeting (if you decide it should be).

Once I had realized that, my business was better. I performed better when I gave myself time to think and choose. I learned to slow down the pace a little, and value the time and space I needed to have a diverse life and a range of experiences.

After all, my clients expect me to be an actual human, too. And let's face it, we want to take advice from people we admire. People we respect. So why not set a good example of what a rich and satisfying life looks like? It might just be your greatest asset as an advisor.

A recommended read, especially if you're struggling in this area:

Getting Things Done by David Allen

This book looks like it's about productivity and how to get more done. But at a time in my life when I had two small children at home, and was trying to grow my business - I was always staring at never ending stacks of things to do at work - it felt like I couldn't get to my life until my stacks were completed. David Allen's book changed my life, because it taught me my personal life was as important of a priority as my professional commitments. And in fact, even more important in the long run.

Authenticity is when
you say and do
the things you
actually believe.

SIMON SINEK

#3

Give the Benefit of the Doubt

Assumption, as the saying goes, is the mother of all mistakes. Assumptions happen when we think we know something - unaware that we might be wrong.

I've found that the most damaging assumptions are sometimes the easiest, most natural ones to make - when we think we completely understand another person, and what they might have meant by something they said or did.

It is so easy to assume the worst - in fact, we have a negative bias at play all the time. All the time, constantly, negative things are working harder on our psychological state than positive things. We remember negative experiences more readily, so we're more likely to link a past negative experience to a present, as yet neutral one.

That can foster suspicious and untrusting relationships and the moment you can free yourself of that, you can open yourself up to more positive interactions and experiences.

I try to always assume positive intent in all my interactions. It takes work and self awareness but it takes away second-guessing.

When I assume that someone I'm dealing with has a positive intent with their behaviors, it saves me from jumping to conclusions and making damaging mistakes.

If you can do that in all your interactions at work with clients, staff and vendors - and maybe even apply it in your personal life, too - you'll have a better experience.

#4

Behind Every Mistake Is a Lesson

I spend a lot of time thinking about what it is that has brought me some level of success - I love analysis. So I take time regularly throughout the year to ask myself what we're doing right and where we could improve.

I recently asked one of my staff what he thought was one of our greatest strengths. He said one of the most important things we do to foster a great work culture is to accept that there will always be mistakes.

Rather than attaching emotion and shame to those mistakes, we see it as a system issue. Something in our system needs improvement. We're always addressing the system, not the person.

And while we're applying that internally to our work processes, it's one of our mantras when working with our clients, too.

People carry around a lot of guilt and shame associated with their money and their spending behaviors and it can really cloud people's judgments.

But I think everyone should feel good about their money.

There should be no blame here. After all, many of our clients have gone through their lives believing that they're doing exactly what they should be doing, because that's how we're getting programmed. Buy this, travel here, drive that. Be a good citizen and keep buying stuff. You're driving the healthy economy. Go you!

And that's fine - but I also see a lot of regret in my clients. I see the lightbulb moments when they realize that it's easy to use their money more wisely. Then they're hard on themselves for not taking this step last year, or 10 years ago, or when they got their first paycheck.

But we shouldn't blame the person, or dwell on the mistake. It's the system that's failing people and needs addressing.

#5

Knowledge Is Never Final; Stay Curious

A favorite quote of mine is this:

"No problem can be solved with the same consciousness that created it." - Albert Einstein

I have always been intensely curious and crave new information. This attitude of constantly learning allows problems to not keep me stuck, but serve as a reminder that I must always keep growing and changing.

There's also something else wonderful about this quote: It implies collaboration and reflection.

You need to bring a new approach to a problem to find a solution. Sometimes you can dwell on some tiny, insignificant details. Some fresh eyes who come with different experiences to draw from may just see something you've missed.

And those fresh eyes may well be yours, after a good night's sleep! They may be a colleague's, they may be a mentor's. And a client may just need your perspective to help them over a few obstacles, to help them to see their financial position in a different light.

Build Your Business Around Who You Are

To me, there is nothing better than feeling good about how your business really works. Creating an ethos that is deeply rooted in who you are, how you think, and what you feel is critical to building a truly authentic approach that will bring meaning and satisfaction to both you and your clients.

Don't be afraid to put your heart and soul into your work, literally. The more you care about what you do, the more this shines through and helps you find the perfect group of clients who will truly value your partnership and advice, and stay with you for a lifetime.

Building a truly authentic business takes time, forethought, and lots of soul-searching. But I sincerely believe there is no better way of doing things.

I wish you every success in your professional endeavors. And if you'd like to talk to me about any of this, you can book an appointment at www.align.financial.

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In any given moment
we have two options:
to step forward into
growth or to step
back into safety.

ABRAHAM MASLOW



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