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## Dealing with client emotion

by Mandy Lamkin, Director, Enrich Australia

IF YOU'RE AMONG THE MANY anxious advisers out there, take credit for dealing with what is a very difficult task: juggling nervous clients' issues and your own private gloom.

Trying to resolve others' emotional needs while your own are being ignored is a logically limited strategy. Further, if it feels like your professionalism is being questioned and you risk losing the trust of others, the stress can move on quickly to distress and even despair.

### A PRACTICAL START

It's not surprising that lately one of the main things advisers ask me for is practical help with how to talk to emotional clients. But when it comes to it, a short-cut 'how-to' or script is only a superficial solution to what really requires a more professional and long-term strategy.

There are, however, a couple of immediate ways to tackle the situation while keeping pace with client need. It starts with a competency that supports interpersonal skills and goes on to restore your sense of control, both of which can have valuable enduring purpose for your business.

First, a professional in any client-facing role, operating in any economic climate, needs some basic skills. Ask yourself if you have appropriate relationship boundaries in place for your function – in other words, are you clear about what your most relevant and beneficial role is for clients and how to maintain its integrity? Secondly, what steps have you taken to deal with your own needs away from your client relationships to ensure that conversations with them don't (accidentally or otherwise) become the catharsis for your personal needs?

### A NOT-SO-OBVIOUS SOLUTION

Apart from the market volatility, there's another less-obvious reason perhaps for anguish among advisers – one that involves a very common aspect of human behaviour to do with where we choose to place the source of power and control in our life – something profoundly fundamental to resilience in challenging times. The fact many advisers may have gained a large proportion of their personal and commercial satisfaction from the bear market potentially means that assurance will be eroded and self-worth undermined when those external forces reveal their feet of clay, as they're presently doing.

The way to deal with this is to first reflect on the extent to which this may be true for you and then 'head home' and take stock. By steering the sense of control back into our own hands we rebuild natural emotional stability because when we stop giving away our power in this way, certainty begins to return. Even the smallest counteraction will feed directly and immediately into redressing the situation. It won't change the economy but it can alter the way you think about its impact on you.

### THE ONGOING STRATEGY

Deal early and deal daily with your mental state, as it makes sense that unresolved emotional turmoil perpetuates isolation and procrastination.

Start by doing something practical to reclaim your personal power and reconnect with core strengths. This, along with knowing your true wholistic value proposition as an adviser makes it easier to pick up that phone and handle the unknown response at the other end.

Ideally your sources of control sit balanced between internal resources and external (positive) influences, which are up to you to accumulate as you're the only one who can create your own sense of security. But practical things you can do today are:

- immediately acknowledge any personal achievements in your work;
- develop your professional capabilities to build on your attainments and self-esteem;
- be inquisitive but also learn to observe situations from the emotional sideline;
- reflect on and respond mindfully to your own needs;
- prioritise mental health by finding new things to do to refresh and relax your mind;
- learn to breathe freely again to relax you body;
- take control of your physical health: improve your diet; see your GP for a full check up;
- get a mentor or coach for impartial support and to set some inspiring goals;
- do something creative: it's fun and delivers a sense of accomplishment.

This list, I hasten to add, represents first-aid tactics and I'm not saying you should exclusively focus on you and your own peace of mind. A stable emotional state is made more secure when you give a little of it to others. So, when you're ready, be with your colleagues and friends as they vent their frustrations. This may sound unattractive but view your time with them as an opportunity to test your boundary-building strategies and as practise for seeing these times through with an easier, more focused mind. And never feel you have to have all the answers – being a generous listener is wise enough.

This strategy also nicely influences the quality and outcome of discussions with clients because it relieves any tendency you may have to be reactive, irresolute or defensive. The last thing clients need to hear is anything less than straightforward and factual, and being clear and genuinely calm will allow you to move on from worry to discussing strategies that let them (and you) get back to sleep at night.

And have you considered that healthily processed emotion might even help you find the empathetic words that clients will relate to and respect hearing from their adviser? Communications fuelled by authenticity also release some of the pressure valves in your head because you cease to feel a need to make excuses: you're real, and you like it.

#### THE FAST TRACK

Taking care of your mental health is taking care of your business' health, so if you need to get back on track consider using the confidential resources available to help you process any anxiety, depression or negative feelings you come up against. This step is often easier if you're a little informed, and the following websites have some great resources. Even think about contacting a trained expert on their telephone or online services as part of realising your self-empowerment goals.

Main providers in this area are:

[www.lifeline.org.au](http://www.lifeline.org.au) – 131114

[www.sane.org.au](http://www.sane.org.au) – 1800 187263;

[www.beyondblue.org.au](http://www.beyondblue.org.au) – 1300 224636

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*Mandy Lamkin is director of Enrich Australia which offers advisers practical solutions for professional development in the areas of ethics, client relations, reflective practice and client philanthropy through FPA endorsed/accredited workshop and online programs. See [www.enrichaustralia.com](http://www.enrichaustralia.com) for more. Mandy can be contacted on (02) 8267 6303 or at [mlamkin@enrichaustralia.com](mailto:mlamkin@enrichaustralia.com)*