



# Time for a chat?

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There is a fundamental place where a career built on loyal client engagement and personal fulfilment is established and sustained.

In the financial sector to date there hasn't been much focus on why individuals become financial advisers and, more importantly, what effect this choice has on the profession and its consumers' perception and satisfaction.

There has also been little emphasis on a corresponding process for personal introspection, or appraisals of the relationship between individual advisers and their profession. While the lack of priority in these areas was perhaps understandable in a distracting bull market, the time is now right – being the beginning of what we'll call an interesting year – for a review.

This is a look at what results we might expect from a productive get-to-know chat not only, this time, with the client, but with yourself and your professional identity.

## CHAT NO 1 – WITH YOURSELF

While bolstering self-awareness has not been part of traditional education in the financial sector, this is being seriously reviewed as the profession considers a range of enlightened responses to its realities.

This is perhaps because there's recognition that the old cliché about knowing yourself first is a truth – especially when it comes to knowing your client. But its value runs much deeper than that.

Being self-aware, in short, means we have the ground to cultivate personal conviction and garner more trust. This is because people will be confident in our authority and authenticity, which automatically rolls over into professional expertise and identity.

But back to you. Think about the qualities in the best conversations you've ever had and you'll find dedicated time and space, a fully present yet open mind, respect and, as an outcome, inspired goals. If these qualities are also present in the conversation you need to have with yourself, then it will be just as productive.

If there's resistance to what seems like some

kind of psychoanalysis, all I'm suggesting is a simple process of familiarisation. If you wish to reflect more, however, you can start with questions to yourself like: "What's the biggest thing on my mind right now?", "When in the past did I experience something similar, and what was the outcome?" and "What can I do differently this time that might give me a better outcome?"

Whether or not you find the answers to these and other questions, doesn't really matter – the main object is to get to know what it's like to spend quality time with yourself, alone, for a least some of each day.

## CHAT NO 2 – WITH YOUR PROFESSION

How we view our professional identity is tantamount to our success in it because this is what we signal to clients, prospects and the world. And it is this view, or how we arrive at it, that is what I mean when I refer to the conversation you have with your profession.

The reason this conversation is important is twofold. First, lack of awareness of how you truly relate to your profession and its public perception may be holding back a lot of positive energy you could be putting into it. You may even be in denial about it – don't forget that old head-in-the-sand syndrome leaves a very sensitive part exposed.

Secondly, any lack of clarity or conviction may be conveying a confused image of both financial advice and you to your clients.

So, some suggested guidelines for introspection here might be: "What is it I love about running a business?", "Is it the same thing I love about being a financial planner?", and "How do these two overlap or complement each other?"

Also ask yourself if your answers represent what you're happy to convey. Could your message be clearer or more passionate? What qualities do you need to bring to your relationship with your work to make it an even more contented, productive one? Try this as well: "What has to happen for me to strengthen my overall conviction or my belief that I give my clients the best outcomes I can?"

Keep in mind that a lack of clarity on these things can have a limiting effect on many areas of your life, not just in your business – where they may also inhibit regular communication with clients. And as we're aware, fear and anxiety can also cause perpetuating depression, and that's not to be taken lightly. Look, it's natural for us to feel insecure when we have to discuss unhappy subjects with anxious people – especially when that person is oneself. However, the longer we put off our self-chat, the harder it is to validate our relevance and value proposition to this world of dramatic change. Further, the more in touch we are with our own core, the greater the sense of control over how we run our lives and the responses we make.

## CHAT NO 3 – WITH THE CLIENT

As a consequence of the above two conversations, dealing with others – clients, staff, family – rapidly becomes more inspired and energised because you will be able to embrace and deal with things as they are, not how you wish they were.

So, consider the empowering, clarifying conversation you have to have with yourself before you sit with the client, or call them to discuss their investment dilemma. When you're clear, you're comfortable, and so will be your clients. The reasons are obvious for focusing on the client. What is perhaps less obvious is the personal work you have to do, and its benefits, before they enter the scene.

Let me offer this in conclusion about the three areas I've focused on. What they're all really about is the fundamental core of reliable self-knowledge that delivers a means by which you can productively and satisfyingly meet all kinds of personal and professional challenges. Oh, and also enjoy your life.

So for the sake of your business, seek out more self-awareness and a deeper trust in yourself – perhaps besides the autopilot ones you've relied on to date. Now sit down, turn off that phone and have a chat with yourself. If you need a hand, let me know, and I mean it – this is a conversation after all. «

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