Published in *Financial Planning* magazine © Copyright 2008

Professionalism development beyond capability

by Mandy Lamkin, Director, Enrich Australia

MANY ADVISERS KNOW that the path to mastering interpersonal skills can be uncomfortable and superficial.

But the development of your professionalism beyond technical competency in the area of client relationship/retention skills has never been so relevant and, for that matter, as much on trial as it is now.

Past experience has shown these proficiencies are often impractical and that maintaining any aspiration for doing things differently will be difficult. And why bother anyway – the clients seem to be happy enough?

In short, identifying, developing and applying the interpersonal skills which sit naturally with you and your style will produce many direct benefits – tangible trust from your client being one of the most desirable.

So-called 'soft' skills have much more to offer than just paying consideration to things like body language and improved listening. When expertly imparted they have the potential to build a deep level self-awareness and authenticity which is contagious in the professional setting.

When you act in a self-aware way that makes a client decide to trust and then believe in you, both of you are presented with the opportunity to create a mutual destiny.

Feeling this intimacy can be a tad unsettling initially, and even push you to the limit of your own particular comfort zone. But by gradually placing belief in yourself and becoming more familiar over time with this feeling you'll soon accept it as a natural and intensely satisfying dynamic in all your client relationships.

Interpersonal skills are not competencies that can or should be acquired like technical knowledge, rather they are a way of doing things which are assimilated with a willingness and openness to becoming aware of clients' individual needs, and finding out how to meet them.

And anyone who offers training in the development of soft skills must recognise that advisers who already have some competency with using interpersonal skills, do not feel comfortable in learning or applying detached text-book techniques which make little sense and only increase awkwardness with clients.

Knowing your client is knowing yourself

In short, the use of interpersonal skills has one main aim – to help us arrive at a grounded place where adviser and client can have a close shared experience of co-creating possibilities. They are intended to build partnerships that deliver outcomes via an open reciprocity.

Any process applied to refining our personal expression or communication abilities must be simple, personally affirming and logical. It must also be able to reinforce that you view clients and their wealth plan as individual.

The basis to these skills must also provide frameworks for the other challenges of the adviser's world around ethics, conflict resolution and even client philanthropy.

Finally, we can always be better at what we do by becoming more self-aware and hence become better advisers for clients.

If we choose to by carry on, unaware, we risk being attached to our same-old working models which, while being dependable, may just be hindering our professional and business development.

And just as importantly, by stunting the growth of our professional development beyond capability, we may also risk impeding the mutual discovery process that so powerfully engages clients – that space we can create for them to open up to asking the kind of great questions, which, in themselves, allow something much richer to occur in the relationship with us. From great questions come astute answers and even greater possibilities.

One last thought: perhaps the greater risk in not developing our awareness of interpersonal skills is that we limit not only our best attributes as advisers but our capacity to respond to and experience what happens when we really connect with others.

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