“In order to create a memorable experience, an advisor has to connect with a client’s individuality.”
Joseph A. Michelli, Ph.D

CREATING DEEPER CONNECTIONS FOR WOW

Greater awareness of what drives your clients’ behavior—and what they value—can provide valuable insight into the most effective ways to WOW your clients. Consider these two constructs:

➔ Personality Style
➔ Emotional Dynamics
  (i.e., meaningful appreciation)

PERSONALITY STYLE

By tailoring your communications to resonate with a personality style, you’ll not only improve personal rapport with clients but also build more effective working relationships with them.

Based on the science of Neuro-Linguistic Programming and Janus Labs’ Personality in Practice program, the three general personality types are:

➔ Driver
➔ Social
➔ Analytical

To identify a client’s personality type, think about how they behave and speak. On the following page you’ll see a sampling of verbal and non-verbal clues that you can use to identify which personality style best fits your client.
PERSONALITY CLUES

Driver
- Time conscious
- May ignore details
- May seem aggressive
- Results oriented
- Direct eye contact
- Minimal social comments
- Voicemail/email may be short in length and to the point

Social
- Outgoing
- Tends to ramble
- Personable
- Warm, engaging eyes
- Enthusiastic
- Expressive gestures
- Voicemail/email will often conclude with something light

Analytical
- Procedural
- Intense listener
- Serious
- Organized
- Compact posture
- Enumerates with hands
- Voicemail/email may be organized and procedural

Refer to the Personality in Practice wheel in this kit for more tips on identifying personalities.
MEANINGFUL APPRECIATION

In order for any relationship to thrive, both parties need to invest time and effort. Part of this includes finding ways to demonstrate your mutual appreciation. Professional relationships work the same way.

➔ How do you currently show your appreciation to clients?
➔ More importantly, is it uniquely personalized to what might be meaningful to them?

The fact is…how you choose to show appreciation may seem perfect to you—but in the end lacks impact for the recipient. To resonate, your acts of appreciation should match the things that are important to your client.

EMOTIONAL DYNAMICS

Appreciation can be shown in a number of different ways including:

Tokens
This dynamic values tangible expressions of appreciation.

Acknowledgment
This dynamic appreciates verbal/written expressions of acknowledgment or praise.

Service
This dynamic appreciates acts that create impact in their life or the lives of others.

Time
This dynamic appreciates one-on-one time invested in the relationship.

Identifying Emotional Dynamics

In the beginning you may have to make an educated guess about how your client might like to feel appreciated. To help you get started, ask yourself the following questions:

➔ Is he/she continually reminding me of things they’re doing or accomplishments they’ve achieved? This may be a sign that your client is seeking Acknowledgment.
➔ What does he/she most often request of me? This may be a sign that your client is seeking either your Time or Service.
➔ Do they have an ‘outsized’ response of gratitude when receiving something material? If so, it’s likely they appreciate tangible expressions or Tokens.
PUTTING IT INTO ACTION

Thinking about two high-value clients, connect the constructs of personality and emotional dynamics.

Client #1: _________________________

**Personality:**
Driver  Social  Analytical

**Emotional Dynamic:**
☐ Tokens  ☐ Acknowledgment  
☐ Service  ☐ Time

Client #2: _________________________

**Personality:**
Driver  Social  Analytical

**Emotional Dynamic:**
☐ Tokens  ☐ Acknowledgment  
☐ Service  ☐ Time

SAMPLE WOW IDEAS
By Personality Style and Emotional Dynamic

**DRIVER PERSONALITY**

**Tokens**
Any tangible item that can help drive results in their business or enhance efficiency in their personal life will be meaningful to a Driver.

➔ Book/magazine subscription of interest
➔ Branded calendar
➔ List of resourceful websites, travel tips or business resources

**Acknowledgment**
Genuine acknowledgment, written or verbal, about something he/she or family member achieved.

➔ Child/family member graduation or other accomplishment
➔ Personal/business achievement
➔ Handwritten note thanking them for their business

**Service**
Act that demonstrates your support in helping drive results.

➔ Educate his staff on a contact management program
➔ Educate her sales force on negotiation styles or energy management (e.g., take advantage of Janus Labs® programs)
➔ Volunteer your service to client's favorite charity

**Time**
Demonstrate sensitivity to their time when scheduling a visit. Have something compelling that will serve his/her interests.

➔ Prepare and review a focused agenda for meeting
➔ Customize communications with quick snapshots of information
➔ Extend an invitation to a seminar that will help boost productivity at work
SOCIAL PERSONALITY

**Tokens**
Something tangible that can be shared with others or reflects a personal touch.
- Picture frames for family
- Books (travel, coffee table book)
- Token to acknowledge birth of a child or family celebration

**Acknowledgment**
Written/verbal acknowledgment that shows you care about them.
- Phone call recognizing child/family member graduation
- Note telling how much you appreciate them as a client
- Lunch invitation to celebrate recent personal achievement

**Service**
Act that demonstrates you have their best interests in mind and genuinely care about their well being.
- Invite your client (and their best client) for a round of golf
- Volunteer time to client’s favorite charity

**Time**
Time spent socializing to expand the relationship.
- Invitation to sporting or cultural event
- Invitation to health and wellness seminar (such as Janus’ Energy for Performance client seminar)
- Host client welcome/open house reception
SAMPLE WOW: SERVICE
“I spearhead an organization whose mission is to serve disadvantaged children. Our organization was only a couple of years old, just getting off the ground. A wholesaler, and longtime business partner, had ties with our local newspaper. Unbeknownst to me, he went to work to get coverage on my yearly event. It worked. You can imagine my delight seeing the front page article—completely surprised! The article was a huge help with our efforts in fundraising.”

ANALYTICAL PERSONALITY

Tokens
Any item that will help in practical living or help them gain knowledge.
➔ Personalized binder for financial statements
➔ Resource guide for financial websites
➔ News article that details recent research within an area of interest

Acknowledgment
Written/verbal acknowledgment of business or personal success with supporting data.
➔ Send data showing how recently earned designation leads to more income (for example)
➔ Send a follow-up letter recapping meeting details and next steps (check all points for accuracy!)

Service
Act that helps to educate staff or colleagues.
➔ Host lunch seminar for their circle of influence on a relevant topic
➔ Educate his staff on negotiations styles
➔ Establish system to automatically provide statements to client’s accountant for tax purposes

Time
Time that satisfies an appetite for learning and gathering details.
➔ Invitation to a lecture series or museum event
➔ Increase expertise of client’s industry and actively share knowledge of recent events

Any actions taken to show appreciation with clients should be done in accordance with your Firm’s compliance policy.

For more information, call Janus at 877.33JANUS or experience us online at janus.com.