Dr. Daniel Crosby's Science of Influence: Getting Your Clients to Take Your Best Advice

Do you see yourself as a leader?

As a financial advisor, you should. If you don't, it's time to start.

Consider this: The most important thread running through every aspect of what you do is *influence*. If you're in a leadership role at your firm, it's critical for you to be able to elicit the support of a group of people to work in service of a common goal.

If you're trying to grow your practice, what you're really doing is trying to persuade people to trust you with their money.

And if you just want your clients to reach their goals, you're likely using some aspects of behavioral coaching to convince them to look past short-term market volatility, set aside their fears, and act in their own best interests.

You may think the value you bring to your clients is tied to your ability to pick the right stocks, or your asset allocation expertise, or to your expansive market and industry knowledge. But the truth is, you're only as good as you are persuasive.

That's because there's a massive gap between what you tell clients to do, and what they actually do. And that's not specific to our industry, either—from medicine to nutrition to exercise, people who seek out advice are notoriously poor at applying it. So you can give your clients the best financial advice in the world, but if they don't take it, what's the point?

To fully embrace the power of influence, you have to think of yourself as a leader.

How do you begin to do that?

Welcome to the second installment of our Advisor Lifecycle Webinar Series. Episode two, Rounding the Bases, features Dr. Daniel Crosby, Chief Behavioral Officer at Orion. During his powerful session, you'll learn how to embrace your role as a leader by developing a deep understanding of the six pillars of influence, as well as how to apply them at your firm.

So what are the six pillars?

The first is *Reciprocity*.

Reciprocity is a deep-seeded, almost entirely intuitive facet of humanity. It means, simply put, we want to be kind to those who are kind to us (and on the not-so-nice flip side, we're likely to seek revenge when we're wronged by others).

While reciprocity is innately built into our DNA as human beings, you can still use it to great effect in your client interactions. Sending an article, remembering a birthday, making an introduction that helps a client's business—these are all easy (and free!) ways to create that sense of reciprocity with your clients.

Ready to learn more? Watch the on-demand webinar now to find out:

- How to effectively respond to thank yous from clients
- Why your clients want to honor the commitments they make to you
- What actually makes you likable

And, of course, the other five critical pillars of influence. Click here to watch *The Science of Influence: Six Simple Ways to Get Clients to Take Your Best Advice.*

Tune in!

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