

## January 27, 2010 Open Mic Recap

### Highlights:

A wonderfully diverse group -- planners, educators, counselors -- gathered for this past Wednesday's Open Mic, to center ourselves, explore client communications (what's new, what's worked, what happens), and follow the conversational trail. We shared stories of group events (for clients, fellow parishioners, friends) based on topics such as: what really matters (beyond the size of one's portfolio); "Spiritual Cinema" (apparently, there is such a thing); extreme money makeovers; and more. References were made to several great resources, which I'll reprise in this Recap. Participants thought it was a great hour, and time well-spent. I hope that reading this Recap and thinking about the questions it poses constitute time-well-spent for you. How about joining us on **Wednesday, February 10 at 5:00 Eastern**, and get Open Mic straight from the horses' mouths?

### Recap:

*"If you can move anywhere, why not move to where the view is?"* A participant uttered this exclamation upon picking himself (and his handset) up and moving to an adjacent room – one with a view of the mountains of the Northwest from one window, and a large body of water from another. I asked him to repeat it, because I thought his expression had the makings of a keen insight – if not a profundity, at least a good reminder. (Think about it: where is your best view ... of the big picture, of what – and who – matter most, of life's beauty, vibrancy, and preciousness?)

*Centering Exercise:* I conducted a 60-second closed-eye meditation, inviting callers to do a "body scan" so they could locate and relax any tensed areas. Responses indicated that this one-minute time-out (or is it a time-in?) was a helpful way of checking in with themselves. Why not take a moment right now, before reading further, to give yourself a one-minute gift of body awareness, and reap the gift of greater calm? Go ahead. I'll wait.

*Client Communications since Sept. 2008 (post-Lehman Brothers, AIG, etc) what have you done differently, what's worked well, what are you doing these days?*

Participants shared important stories and learnings:

One planner (in the Midwest) has adapted Jackie Kelm's ([www.appreciativeliving.com](http://www.appreciativeliving.com)) appreciatively-focused group exercises. She has conducted groups in her church, which "have unearthed the treasures in their lives; the most moving and intense sessions. Over and over, we learn in these groups that there's so much more to the equation than the numbers." (I hope you agree with me that this expression is worth underlining.) She's incorporated Jackie's "appreciative living" exercises into her own Financial Foundations course. Her most recent group session was especially moving, as group members contemplated their own material abundance and comfort, in contrast with Haitians' plight in the aftermath of the horrific earthquake.

Picking up on those themes, another planner (in the Northeast) recommended Spiritual Cinema Circle ([www.spiritualcinemacircle.com](http://www.spiritualcinemacircle.com)) as a great resource for awakening joy, wonder, and connection. He recently invited clients and friends to an evening of viewing and discussing a series of beautifully-made, inspiring, thoughtful (and short) films on spiritual themes. His teaser, in his promo: “Because you’ll exit feeling better than when you came.” We’ll look forward to his report of how it went. I checked out the website, and was impressed. Why not check it out for yourself?

A third planner -- in warm, sunny California - described a financial planning phone bank sponsored by a local bank and a local newspaper, with which he’s been involved for years, along with attorneys and accountants. Clients are able to speak with him, a CPA, and attorney (sequentially, as though stopping in each doorway of a virtual office) and “can create an amalgamated financial plan in two hours.” He finds this a very rewarding way of giving back; additionally, he comes away with a new client “almost every time,” by referral from one of the reporters. He’s also participated in the “extreme Money Makeover” initiative sponsored in part by FPA.

I asked participants, ***“What have you learned, in this period, about client communications?”***

Our Midwest planner said she finds that through authentic and appreciatively-focused conversations, “it (client-planner communication) keeps getting better and better. Always new milestones, great ways to elicit information that clients want to share, and that they come to us eager to share. These tools are more efficient and effective.”

I pointed out that there seemed to be a “confessional” quality to what her clients have been sharing about the pain caused by financial reversals and the like, and she agreed. I noted that Dick Wagner has written and spoken for years about financial planners being akin to 21<sup>st</sup> century priests. We just happened to have Dick with us on the call, and so I asked him to share his thoughts. He affirmed the notion of planners being “pastors of the 21<sup>st</sup> century,” adding that clergy deal with all aspects of parishioners’ lives, with the sacred as the unifying theme, and financial planners increasingly deal with “the whole of the client’s life,” with money as the integrating cornerstone. He noted that religion and money are both human creations, with common roots in helping people unify and make sense of their lives. (Note: it’s always handy to have Dick Wagner around at the very moment that you need him. And, I hasten to add, at other times.)

Another participant – a pastoral counselor – posed the “So what?” question (without stating it so rudely). Noting that conversations about meaning, life’s priorities, and the like often are deep and emotionally satisfying, she wondered about “the practical fruit they yield for the financial plan.” This led to lively contributions, one planner stating that his own life planning journey has helped him to be more present with his affluent clients, guiding them in (a) appreciating their attainments and wealth, and (b) identifying authentically meaningful goals (as defined by the client), not necessarily centered around ‘stuff.’ Another planner said that deep conversations carry over to subsequent meetings and to her clients’ more sustained execution of their financial plan. She said that “most of our clients are middle Americans, who feel the check that they write to us. We see the value they perceive in this kind of work, through higher execution rates,

personal letters of thanks, increased referrals. And since these people are our neighbors, we see them all the time, in supermarket parking lots and movie theaters, and we sense the warm connection.”

A moment of reflection seems in order here, so let me invite you to entertain these questions: How has your client conversations changed during this period? How -- if at all -- have you changed how you approach your clients, what topics you raise, and the resulting connection with them? What have you learned, about your clients? About the professions you are in; about the service you provide?

If you'd like to go further, and have a conversation with your colleagues about client conversations, here are some questions you might use:

What you have noticed about your client conversations? What new questions, topics, or gatherings you have experimented with? What's worked especially well? Also ask “When you have ‘deep’ conversations with clients, are these discussions simply nice-to-have, or do they have a ‘real-world,’ bottom-line impact on the client’s behavior in carrying out their plan? What other impacts have you seen?” (If you engage your colleagues in such conversations, write me and let me know how they go. Or join us on OM and tell us. See the next paragraph for how-to.)

To find out if an Open Mic hour is time-well-spent for you, **join us for the next Open Mic, on Wednesday, February 10 at 5:00 pm Eastern Time U.S.** If not on that date, then pencil us in for **Wednesday, February 24 at Noon Eastern. Call 1-219-509-8322, passcode 202779#.**

Appreciatively,  
*Ed*

**Ed Jacobson, Ph.D.**

Author of *Appreciative Moments*

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