

How to Attract Clients

Ah, those magic words – “Attract Clients”. Virtually every agent and advisor I know loves the idea of attracting clients, and would be even happier if there was a “magic formula” for accomplishing it. Well, actually there *is* a formula that works like magic for attracting clients to you. And I’m going to reveal it – right here, right now. (OK, to be more specific, it’ll be at the end of the article. But no cheating! You need to read through the article for the formula to make sense.)

First of all, this isn’t about simply “getting” clients. It’s about attracting them to you. It is the concept of building a business without chasing prospects, dogging down purchased leads, or operating a “quote mill” – turning out quote after quote hoping to have the lowest price. Unfortunately, many agents are either trained or take it upon themselves to uncover prospects “at arm’s length”. It seems that either intentionally or inadvertently, companies often train their agents to build their business by **pursuing** prospects. Although many companies and managers praise the benefits of “attracting” clients, when it comes time to meet production quotas, all the methods which “pursue” clients are the ones encouraged. By the time “meeting production quotas” become an issue, drastic measures are called for.

The solution, of course, is to avoid being in that place of “catch-up” to begin with. By learning how to attract clients and by applying those methods consistently, you side-step the need to pursue clients altogether. Virtually every agent who has a sizable, growing business – characterized by high retention and a steady flow of client referrals – does it by attracting clients rather than pursuing them.

There are two key components to successfully attracting clients. The first key is to understand that people will be attracted to you by WHO YOU ARE, rather than by WHAT YOU DO. While there will be a small group of people who will do business with you strictly based on your depth of knowledge, most people – in fact, the majority of people – will do business with you because of who you are. Having good knowledge of your products, services, and industry is important. And having strong technical skills is useful and important as well. It’s just that being knowledgeable and skillful isn’t sufficient.

Let me offer some proof. I’m willing to bet that we’ve all known one or more agents who were an absolute fountain of knowledge regarding policy clauses and implications. And yet, they went out of business due to lack of clients. In contrast, I’m also willing to bet that we’ve also known agents who really weren’t all that sharp when it came to understanding clauses, presentations, and analyses. And yet, these agents built and sustained large agencies. The reason, of course, is that clients were attracted to them for who they were, more so than what they knew.

So, how do we maximize “Who We Are”? We maximize and amplify who we are by continually improving our communication skills, our social skills, and our integrity. In short, “who we are” is defined by our people skills. When we have good people skills, we:

- Communicate clearly and cleanly
- Are relatable

- Do what we say we're going to do
- Are professional in attitude and manner
- Have a positive attitude
- Take an interest in others
- Treat people with respect

How do we improve in these areas? The easiest way to start is by simply being more mindful of each of those people skills. Just by drawing our attention to each aspect of good people skills, we can begin to improve. However, one of the challenges most of us have in improving ourselves, is that often we're blind to what we do and say. We operate on "auto-pilot", and as such, aren't even aware of how we come across to others. Additionally, how **we** think we come across to others doesn't really matter. What matters is how **others** feel about us. Therefore, an excellent way of improving our people skills is to enlist the help of others. Ask people around you to help. Ask a spouse or significant other. (Hey! They're always hoping to improve us anyway, right?) Ask a fellow agent. Ask a manager. Tell them you're working to improve your people skills, and 1) ask them which people skills they feel you're really good at, and 2) ask them which ones they feel are candidates for improvement. Then, ask them to point out to you any words, actions and reactions which represent opportunities for improvement as they arise. Not only will people be happy to help, but they will respect you for your efforts.

The second key component in attracting clients is actually getting out, so that people get a chance to see you, know you, and be attracted to you! The reality is that when you are in your office behind your desk, prospects never get to experience you and those people skills you possess. The result? If you try to get clients from behind your desk, you end up having to pursue them. On the other hand, when you get out and allow people to interact with you, you end up attracting them.

OK, so here's the "magic formula" I promised. The way to successfully attract clients is to improve your people skills, and get out and meet people. I know it's a pretty simple formula, but ... it works like magic.

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