

# Shifting from meeting socially to meeting for business

## Habits of highly effective financial professionals

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Financial professionals often meet people through their relationships with others. These occasions open up the opportunity to get to know those who could be promising prospects.

### Jumping past the awkward step

It can be challenging to make that initial move because you don't want to seem pushy or give the wrong impression—or potentially jeopardize a trusted personal relationship. In the case of friends and neighbors, some financial professionals presume these people know their occupation and mistakenly think, *They'll ask me if they need help.*

These reasons, while understandable, could hinder people from engaging with you to find the financial help they may need. Dig deeper to make the most of your connections:

- How many contacts do you have in your phone list?
- How many have you talked to?
- What about your social groups?

**The key is to separate who you are in your personal life from what you do for a living. By making this distinction, your personal relationships and real connections remain intact.**



Essentially, your personal self is giving your professional self a warm introduction.

### Distinguish yourself

Master the script below to distinguish who you are from what you do. Not only will it be easier to make the transition, you'll be able to focus on the other person without worrying about yourself.

#### TIP

Add this script to your smartphone and practice until you nail it.

"Now that we've spent time together socially (serving on a committee, as members of the same club, as neighbors, etc.), I would like to introduce myself to you professionally.

"Let's set up a time to talk in more detail. After we discuss your business and mine, we'll decide if we should pursue a potential business relationship. Would Tuesday or Thursday be best?"

## Make the most of your social experiences

Use your personal relationships to make a smooth transition to business opportunities. Once you gain your prospect's confidence, you'll be better able to offer a service that could help them reach their financial goals.

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