



INNOVATIONS

Business-Building Ideas for Today's Advisor



Inspired Training for Financial Professionals

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Active Listening

Professional Communication Skills

Your ability to listen actively may be one of the most vital professional skills you can master. Active listening takes energy, concentration and practice. It demonstrates on a conscious and sub-conscious level that you truly care about the client and are eager to understand what makes them special. Here is a basic outline of active listening techniques.

	Purpose	To Do This	Examples
ENCOURAGING	To convey interest and encourage the other person to keep talking	Don't agree or disagree; use neutral words; use varying voice intonations	"Can you tell me more...?" "There's a great story in there somewhere...I'd love to hear it."
CLARIFYING	To help you clarify what is said and to get more information	Ask questions; restate wrong interpretation to force speaker to explain further	"Are you saying...?" "Please tell me more about that." "What does that look like?"
RESTATING	To show you are listening and understanding what is being said. To check your meaning and interpretation	Restate basic ideas and facts	"I thought I heard you say..." "We may need to check this out further." "So would like to know more about hedge funds. Is that right?"
REFLECTING verbal	To show you that you understand how the other person feels	Reflect the speaker's basic feelings	"You seem quite passionate about this idea." "This is exciting for you, isn't it?"
SUMMARIZING	To review progress; To pull important ideas, facts and feelings together; To establish a basis for further discussion	Restate major ideas expressed including feelings	"These seem to be the key ideas you've expressed..." "What I hear you saying is..." "Is it about...?" "Let me make sure I understand you..."
VALIDATING	To acknowledge the worthiness of the other person	Acknowledge the value of their issues and feelings. Show appreciation for their efforts and actions.	"We appreciate your willingness to delve into this difficult issue." "I recognize the commitment you've made to this effort." "I think I understand why you'd be confused by that."
BUILDING Avoid doing this too early in the conversation	To help build and continue the discussion. To offer other opinions.	Ask questions; offer ideas or suggestions	"Have you considered..."
REFLECTING non-verbal	To convey and clarify the speaker's non-verbal message	Verbalize the speaker's body language and/or facial expressions	"I've been noticing that when you talk about your portfolio you get a little tense. That makes me wonder if there is something in there that might be causing you concern."