

# Customer

Rapport  Relationship  Retention

# Communication

version 1.1

[www.JustUnitTrust.com](http://www.JustUnitTrust.com)

**+ - × ÷ = ≠ × ÷**

Jaslinah Rahman, CFP IFP B.Acc Univ Malaya

“Tell me and I’ll forget.  
Show me and I may remember.  
Involve me and I’ll  
**UNDERSTAND”**

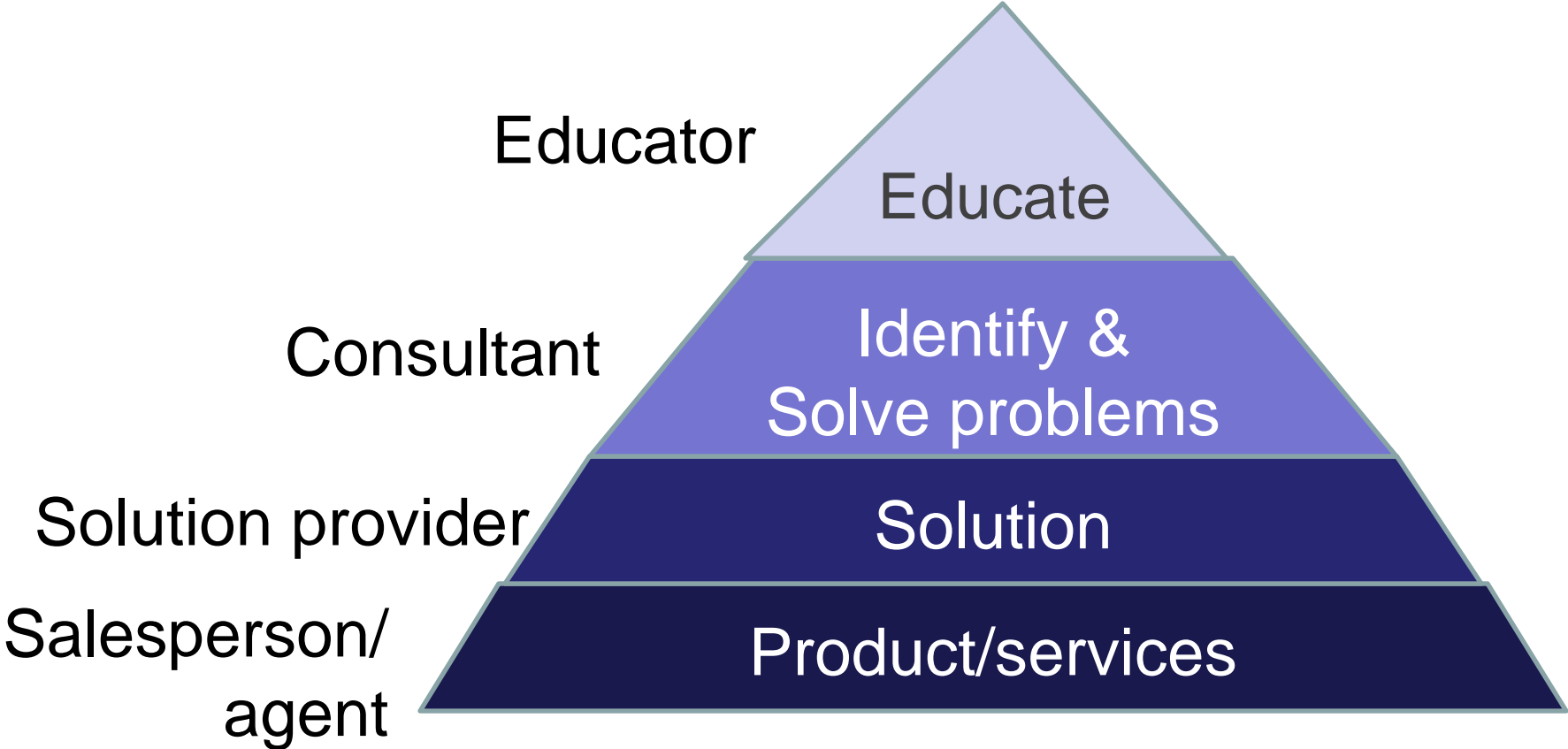
– Chinese Proverb



# Customers for Life

- ✓ Starting right – position & be a friend
- ✓ Go beyond – do more, understand needs, add value to relationship, be different (yourself).
- ✓ Keep relationship – think of them, personal branding, communication – hi tech & hi touch.
- ✓ Build trust – to influence.

# Position yourself right





# Building Rapport

- Rapport is different than a relationship takes time to grow and build, rapport is instantaneous.
- Relationship is time-based. Rapport is not
- Anything that makes us seem like a friendly, likeable person help build rapport.
- Go further establish a connection in terms of interests, values & ideas, we can strengthen rapport further.



# Building Rapport

**7 ways** to successfully gain & maintain rapport with your prospects :

- ✓ **Firm handshake** – strong, confident person, happy to meet prospect.
- ✓ **Smile** – makes you likeable. “Smiley” people are more attractive people.



# Building Rapport

- ✓ **Get out of other's "intimate space"**
  - 3 distances in interaction : business (farthest – meetings), social (closer – friends) & intimate (closest).

If realise getting too close to prospects & making them uncomfortable (closed body language), slow down, get out of their intimate space ! Allow them room to breathe.

application : prospecting, sales presentation



# Building Rapport

- ✓ **Find their values**
  - then use them to your advantage – talk about them to “connect”.
  - be aware (Sales Ninja) of surroundings (photos, books, favorite colors & décor).
  - be interested !
- ✓ **Have open posture**
  - indicates that we trust a person & feel comfortable around them.
  - closed posture (examples) create psychological barriers. Do the opposite !



# Building Rapport

- ✓ **Be careful using buzzwords/jargons/lingo**
  - use language that will reach out to prospects.
  - may sound impressive to us, but not to prospects !
  - tailor to prospects level of understanding
- ✓ **Be sincere and show interest**
  - acknowledge their statements “Yes”, “Good”, “I see”.
  - can relate our own experiences.
  - ask relevant questions.



# Building Rapport

## strategies to strengthen relationship

(Dr Lawrence Ng)

1. Re-use his/her words
2. Friendly, Smiling Face
3. Ask Questions to encourage
4. Use sounds to support
5. Say his/her name 5 times
6. Listen first, then summarize
7. Be there with your heart
8. Say thank you, 3 times
9. Start, a little laughter



“ No Rapport  
No Right to Sell ”



# More Rapport Building TIPS

1. Mirroring (visual) body language of prospects (Demo)
2. Right frequency as prospects (Audio)
  - Pace of talk
  - Voice intonation



# More Rapport Building TIPS

## 3. Verbal Tai-Chi : Allign & Redirect

- objective is to protect relationship, build trust & confidence before suggest/express ideas in a persuasive manner.

- starting points :

“ I understand...” “I see...” (nod your head)

“ I appreciate it...”

“That’s interesting... and if...”

“I agree ... and ...”



# More Rapport Building TIPS

3. Verbal Tai-Chi : Allign & Redirect  
- verbal weapons :

“maybe...” “perhaps...”

“ If I were you, I’d also feel like that...”



# AVOID Breakdowns in Communication

DO NOT :

1. ASUME
2. Generalise
3. Silence (no reply)
4. Talk out –ve emotions (frustration, anger, revenge, sad) & words (personal attack)
5. Interruptions & always attacking
6. Confusing instructions, messages
7. Moody / sulky / Inertia face
8. Poor eye contact

“Minds are like parachutes,  
they only function when  
**OPEN**”

- Lord Dewar



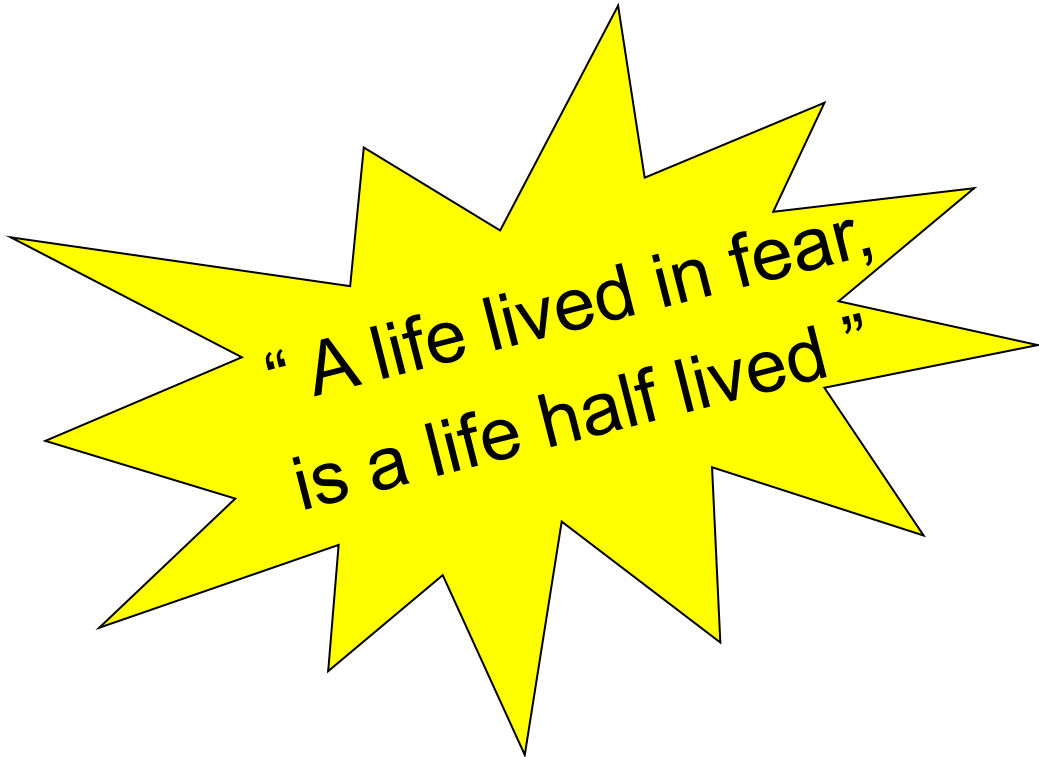
# Be FRIENDLY

- What's stopping you from being open, from being friendly, from building rapport, from making that first move ?
- FEAR ?
- SHYNESS ?
- Procrastination ?



# Understand Your Fear Factor

- **False**
- **Evidence**
- **Appearing**
- **Real**



Don't ignore your fear,  
**UNDERSTAND** it.



# Fear Effects Us

## (i) Mentally

Irrational thoughts & decision making

- Super-sizing problems
- Under-sizing self
- Over pessimism

## (ii) Emotionally

- Intense unpleasant feelings.
- Build aversion (defensive)

..often fear is  
only a PERCEPTION playing in the mind..



## Fear Effects Us

### (iii) Physically

- Blood pressure, increased heart rate, sweating, quick breaths, stomach pain.

### (iv) Socially

- Paranoia, withdrawal, aggression, hatred



# Confront Our Fear

- Don't run from fear, be aware of it
- Fear of ...
  - ✓ Offend others
  - ✓ Rejection
  - ✓ Not liked
  - ✓ Disagreement

} people

  - ✓ Lack knowledge / skills
  - ✓ Failure meet targets
  - ✓ Make mistakes

} incompetent



# Confront Our Fear

- Fear of ...
  - ✓ Not meet expectations, targets
  - ✓ Taking responsibilities



## Self handicapping

- ✿ set for failure
- ✿ blame external factors
- ✿ unwilling take responsibilities

## Over compensation

- ✿ desperation
- ✿ over aggressive sales behavior
- ✿ tempted breach ethics



# Overcome Our Fear

## 1. Be secure in WHO YOU ARE

- a) Know yourself (be yourself, only better)
- b) Be comfortable with your strengths and weaknesses
- c) Know clearly where your security comes from (secure person less likely fear how others perceive them – not hostage of public opinion)



# Overcome Our Fear

## 2. Positive Conditioning

If you don't know how to fall, you're not ready to walk...

- a) Learn not to take rejection personally
- b) Healing by learning (quickly) – reflect on mistakes, avoid making same mistakes, maybe journal / share them.
- c) Learn to channel that nervous energy, learn to channel that sorrow (distress)
- d) Learn to RELAX.



# Overcome Our Fear

## 3. Discipline

Set daily goals to achieve.

Set a good working schedule and stick to it !

Stay Focus and penalize yourself if you're distracted.

## 4. Practice, practice, practice

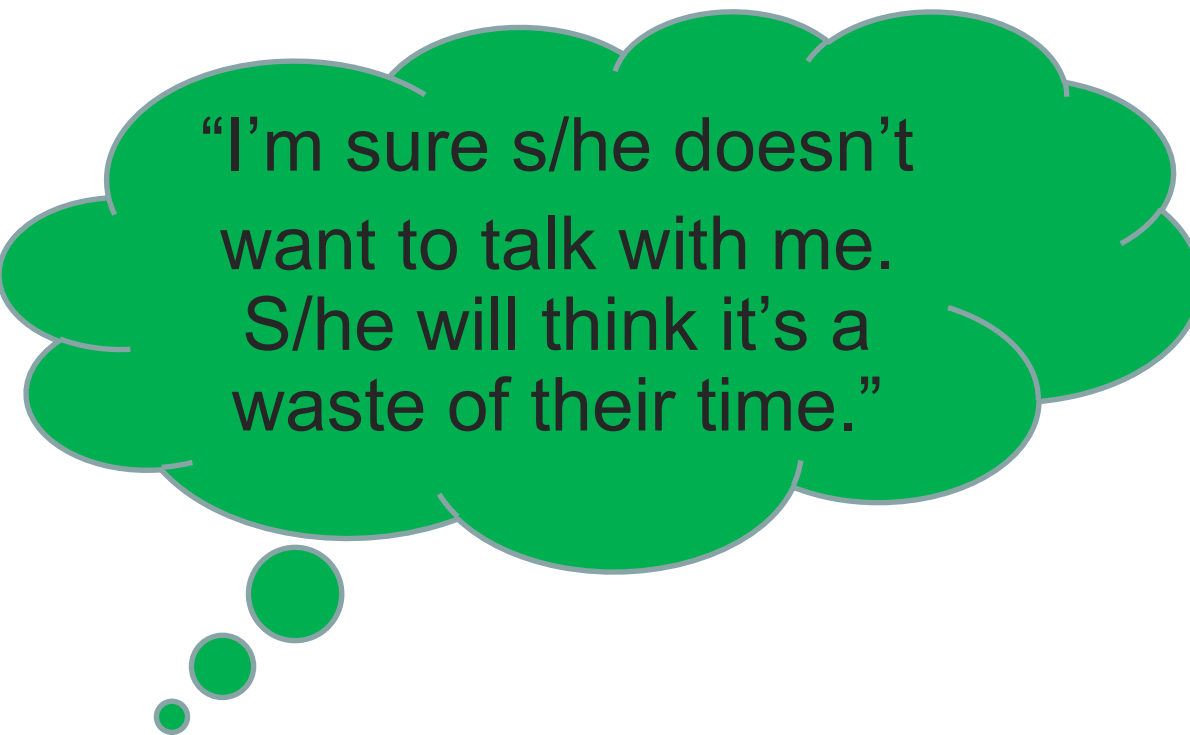
Roleplay & feedback.

See more prospects, more presentation, more sales activities.

# Overcome Our Fear

## 5. Mental Preparation (for investors)

Changing mental script (self-talk)



“I’m sure s/he doesn’t  
want to talk with me.  
S/he will think it’s a  
waste of their time.”

# Overcome Our Fear

## 5. Mental Preparation (for investors)

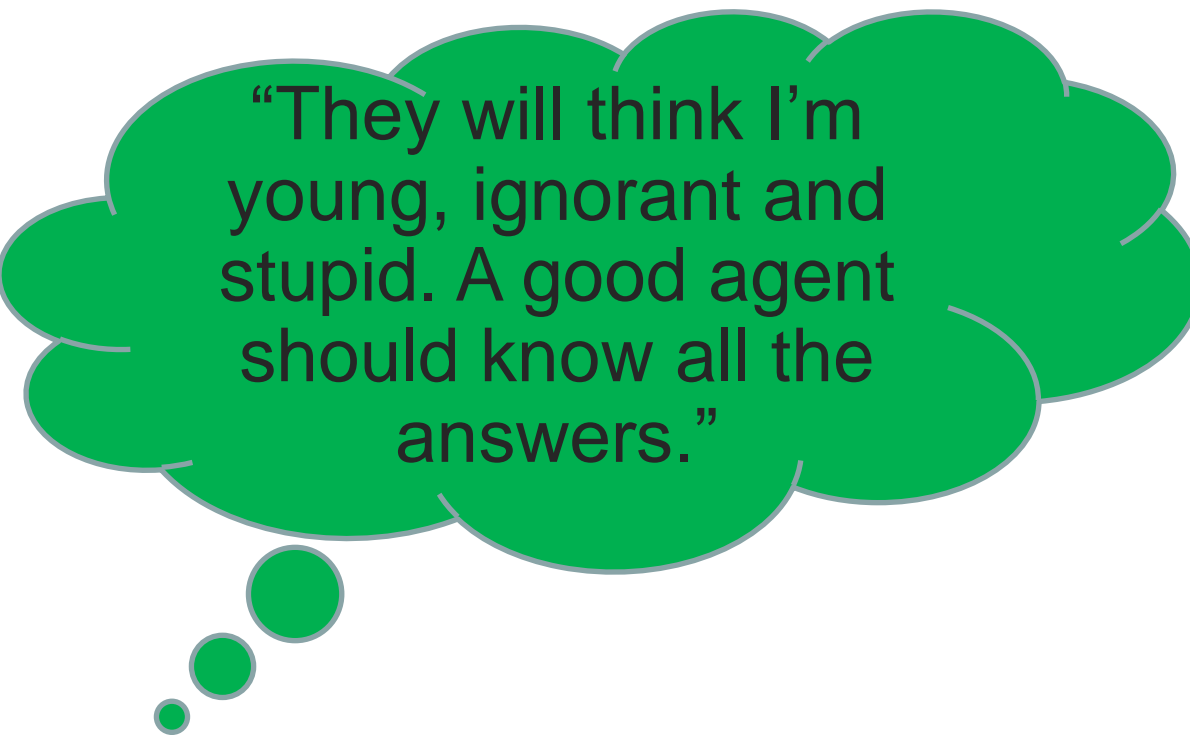
Changing mental script (self-talk)

“I’m sure s/he doesn’t  
want to talk  
S/he will  
waste of

“I have no idea whether  
they’re interested or not, but  
I will be clear & concise.  
If they’re interested, then it’s  
an opportunity for me.  
If they’re not, it’s ok. At least  
I’ve tried...NEXT”

# Overcome Our Fear

## 5. Mental Preparation (for investors) Changing mental script (self-talk)

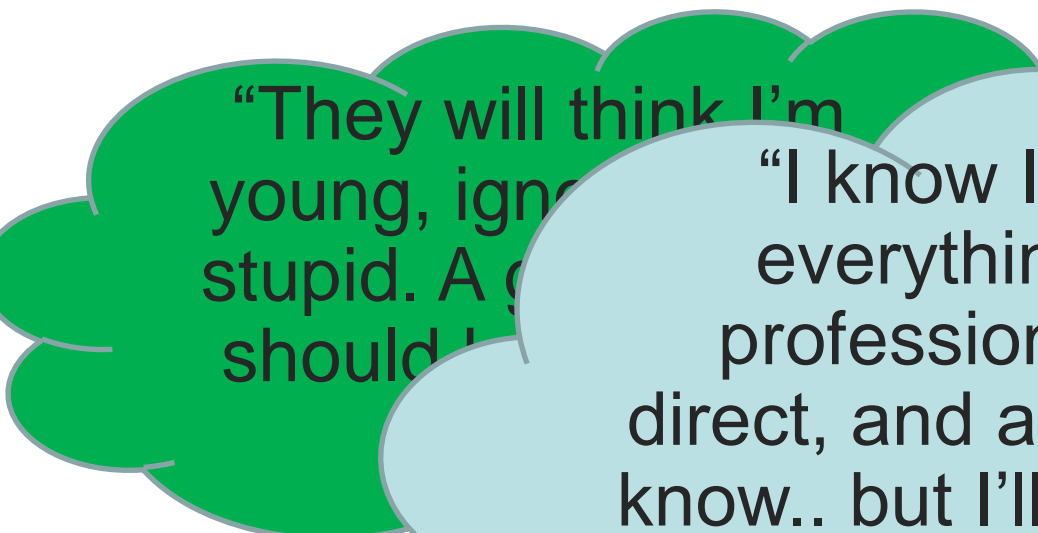


“They will think I’m young, ignorant and stupid. A good agent should know all the answers.”

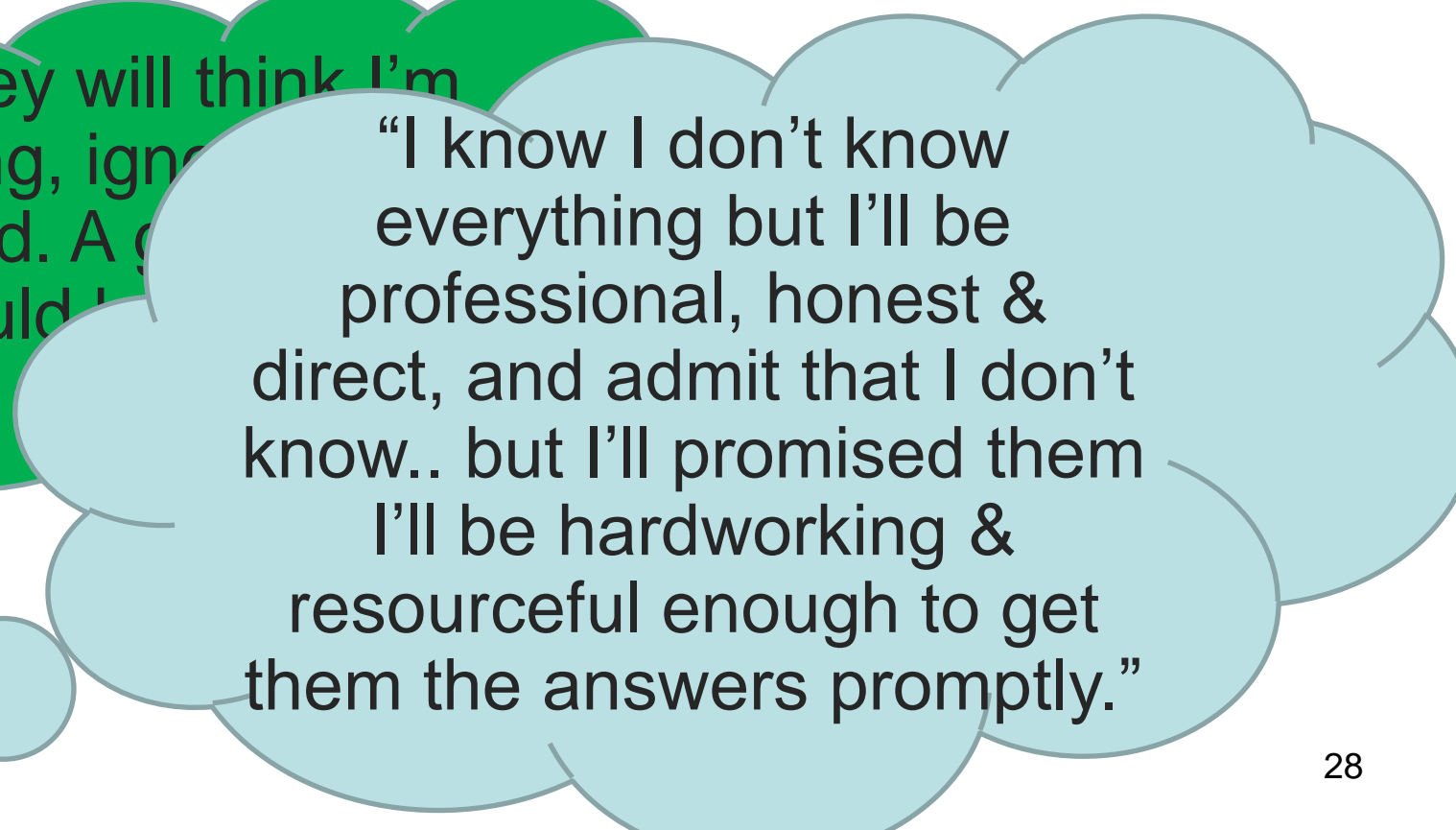
# Overcome Our Fear

## 5. Mental Preparation (for investors)

Changing mental script (self-talk)



“They will think I’m  
young, ignorant  
stupid. A  
should I

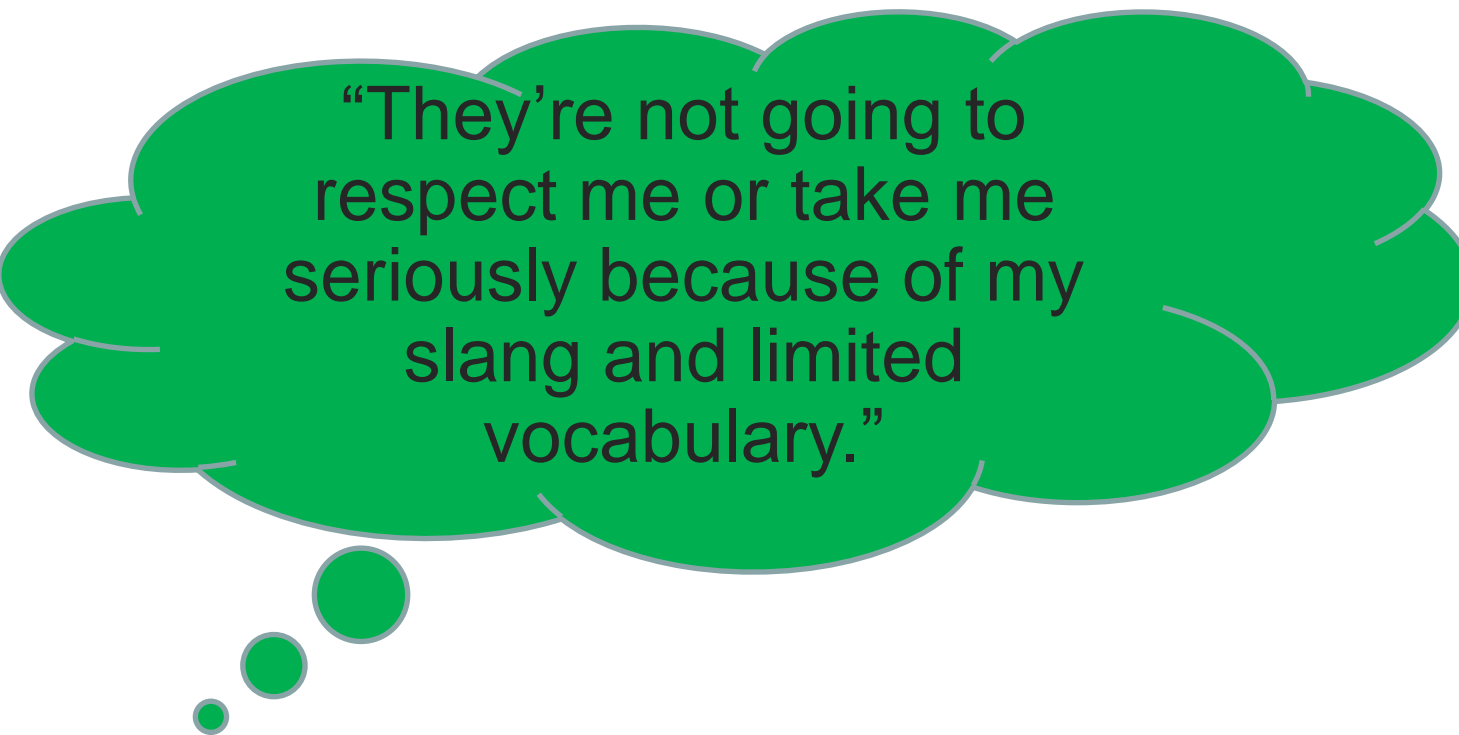


“I know I don’t know  
everything but I’ll be  
professional, honest &  
direct, and admit that I don’t  
know.. but I’ll promised them  
I’ll be hardworking &  
resourceful enough to get  
them the answers promptly.”

# Overcome Our Fear

## 5. Mental Preparation (for investors)

Changing mental script (self-talk)



“They’re not going to respect me or take me seriously because of my slang and limited vocabulary.”

# Overcome Our Fear

## 5. Mental Preparation (for investors)

Changing mental script (self-talk)

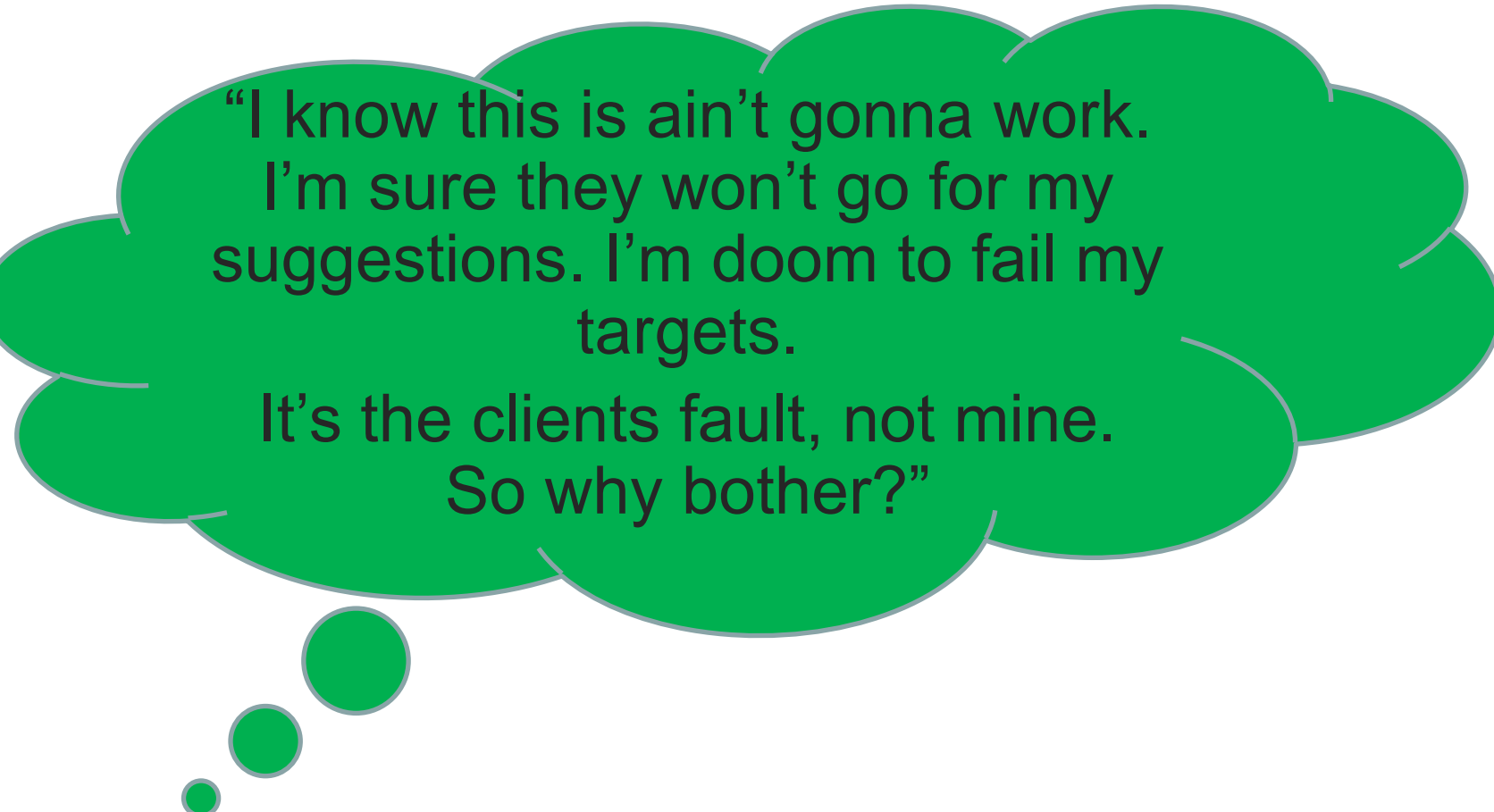
“They’re not going to respect me & take me seriously because of my slant & voice.”

“This is not a language test. I may not be the best speaker in the world, but I am interesting/ thoughtful & careful with my words. They’ll know that I’m serious & professional and can get things done.”

# Overcome Our Fear

## 5. Mental Preparation (for investors)

### a) Changing mental script (self-talk)



“I know this is ain’t gonna work.  
I’m sure they won’t go for my  
suggestions. I’m doom to fail my  
targets.

It’s the clients fault, not mine.  
So why bother?”

# Overcome Our Fear

## 5. Mental Preparation (for investors)

### a) Changing mental script (self-talk)

“I know that  
I’m sure  
sugg

It’s

“I know in the end it’s the investor’s decision & not under my control, so I will not focus on it.

I’ll focus on what I can do to help the investor trust me & make a good decision.

Shud I fail, I’ll accept my mistakes & learn from them.”

Success is going from failure to failure  
with **GREAT ENTHUSIASM**  
– Mark Twain



# Conquer Our Shyness

- Shyness is “all in the mind” – being nervous, introvert & timid.
- Once you behave with confidence, **YOU ARE IN THE ZONE – BOLD AND NO LONGER SHY !**



# Conquer Our Shyness - TIPS

## 1. Self-affirmation

“I feel great !” “I’m fantastic !” silly at first but they work. Your mind starts to believe what it repeatedly heard.

## 2. Always look your best

regular shower, nice haircut & clothes, polished shoes, workout regularly – build self-esteem



# Conquer Our Shyness - TIPS

## 3. Acknowledge you are shy (tell)

If people know you're really shy, they'll understand that you're not impolite or uninterested, and maybe they'll take extra effort to interact with you instead.

## 4. Constantly try improve yourself

New hobby, new skill to help increase your "worth" - give you courage when starting out something new.



# Conquer Our Shyness - TIPS

## 5. Learn to deal with rejection

Its just a number game.

You can't please everyone, so you've got to please yourself !

It's not the end of the world is someone doesn't like you, many others will.

Rejection are merely feedbacks.

“Knowing is not enough,  
we must **apply**.”

Willing is not enough,  
we must **DO**”

- Goethe



# Breaking PROCRASTINATION

- Often its not the lack of knowledge, that causes delay.
- The most effective people have learnt to deal with procrastination on a regular (daily) basis.
- You cannot recycle “wasted time” !



# Breaking PROCRASTINATION - TIPS

How do you defeat personal procrastination ?

1. Plan your tomorrow – 15 minutes everyday before you leave for home (helps focus).
2. Prioritize 3 – 4 major tasks that must be accomplished tomorrow (justify your existence) & to procrastinate-intelligently on lesser important issues.
3. Then go home, and really “be at home”.
4. Next day, start early on your “to do list”, before you get distracted later in the day.

Don't let customers go after one  
purchase.

Win them back with a

**FOLLOW-UP PROGRAM**



# Retention : Customer LOYALTY

Some tips :

1. Thank-you notes – tell them you're genuinely thoughtful.
2. Postcard mailing – “quote of the month” “Recipe of the month”, “time management” less promotional here, but still informative.
3. E-mail update – regular updates that keeps customers in the loop. Referrals maybe ?
4. Get together for coffee or lunch.
5. Special occasions – birthday, new child.



# Retention : Customer LOYALTY

Some tips :

6. Follow-up on well-being – illness or mishap.
7. Pass referrals – network within your clients & add value.
8. Post-sale feedback – quality of service and implement feedback.

Paralyze their resistance with your  
**PERSISTENCE**



focus

stronger **RELATIONSHIP**

influence

convince

control

align

awareness

# Strategies on Handling **VERBAL OBJECTION**

use the **VERBAL KUNG FU**  
(Dr Lawrence Ng)



focus

stronger RELATIONSHIP

influence

convince

**control**

**align**

**awareness**

Redirection - wait right time, get small "yes"es via chunking (step by step)

Agree & understand – align with feeling - create trust & let them hear what they want to hear first

Sensitive to change



**focus**

Bonding & relationship

**stronger RELATIONSHIP**

Maintain Rapport – win/win attitude

**influence**

Personal Impact & Benefits – hooking, show comparison (visual)

**convince**

Transfer committed feelings – eye contact, right tones, heart-to-heart, non-verbal support

**control**

**align**

**awareness**

“It’s not whether you get  
knocked down, it’s whether  
you **GET UP**”

- Vincent Lombardi