ADVISOR RESOURCES: TIPS & TACTICS

7 Steps for Bettering Your Relationship-Building Skills



1

Monitor your "self-talk"—or tame your internal monologue.

2

Expand your emotional vocabulary. Put feelings into words with one new word a day.

3

Improve your awareness of body language—read your own and that of others.

4

Practice self-evaluation—and reflection. After each interaction with clients, ask yourself: What surprised you? What impressed you? What moved you?

5

Practice mindfulness to improve your sense of presence.

6

Spend three minutes a day in total silence.

7

Keep an observation journal and write down the things you notice.

We are committed to helping advisors improve their business and prepare their clients for the future. Please contact your Lazard Regional Consultant or our Sales Desk at 1-800-823-6300 to learn more about our value-add offerings.

Notes

1 Roger Fisher, William Ury, and Bruce Patton, Getting to Yes: Negotiating Agreement Without Giving In, 2nd ed., 2011. Originally published on 18 March 2024. Revised and republished on 16 April 2024.

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