

Five Questions to Overcome Emotional Barriers With Prospects

Human values have a deep-seated set of emotions attached to them. Discover and connect with your prospect's values to forge a connection and build trust.



Discovery questions are critical to the sales process. A prospect's values, principles and pains often lead to their financial strategy.

1. Where are you from?

Why We Ask This Question: This question takes the prospect back to their childhood memories that may include their family, friends, hobbies, first job and so on. The key is to listen to their response and try to learn about their values, beliefs, priorities and goals.

2. Is there anyone else besides yourself (the both of you) whose future is impacted by your financial decisions?

Why We Ask This Question: This question is important as many Baby Boomers are faced with the possibility of taking care of their parents and many would like to do so by providing care in their own homes. This question also gives the prospect the opportunity to share information about family members with special needs.

3. How important is socially responsible investing to you?

Why We Ask This Question: This question can help you build trust with the prospect and gain insight into their values.

4. What are some of your financial concerns and/or challenges?

Why We Ask This Question: This question gives the prospect the opportunity to share their current and future pain points.

5. What do you want or expect out of the partnership with your financial advisor?

Why We Ask This Question: This question triggers the prospect's imagination as they paint a picture of what this relationship should look like. This is a strong, emotional question that should provide specific things that the prospect is receiving from an existing relationship or things that they value that are not taking place. Remember, you can open their eyes to additional value.

