



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS  
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## MEMBER BENEFITS

### Get Noticed: 3 Keys to Effective Self-Promotion

By **Connie Kadansky**

*You may be the greatest advisor in the world, but if nobody knows it, success will elude you. FAs have to market themselves to win more clients. If you're reluctant to self-promote, here's how to get past it.*

As a second-career advisor, Chip is five years into his financial services career. He works for a small but powerfully niched company. While he works long hours, Chip is not making the kind of income he wants to make. He complains that he is largely unknown, and his firm—though credible—is not a household name like the big institutions that advertise heavily. He considers these major disadvantages when prospecting in his niche.

What can Chip do to make his 2008 better than his 2007?

If you are largely unknown, what can you do to get known? If the key to success in real estate is location, location, location, then in the business of financial advising, you need visibility, visibility, visibility. What are you doing to get visible within your marketplace?

Performance alone no longer determines success. In their book *The Psychology of Sales Call Reluctance*, pioneering researchers George W. Dudley and Shannon L. Goodson discovered something more important than performance: self-promotion. Some of the most highly paid and powerful professionals they interviewed did not attain their positions by being the most technically competent. They did it through purposeful self-promotion.

Some FAs are natural promoters. They were born with the instinct to self-promote. For others—often the most loyal, motivated, and deserving—self-promotion is emotionally difficult. They are rendered invisible by a spirit-crushing condition Dudley and Goodson call the fear of self-promotion.

Research shows that in our culture, the highest rewards don't go to the hardest working, most intelligent, or even the best prepared. The highest rewards go to the people who are most willing to self-promote. Self-promoters know that they must knock on doors, make the phone calls, and do whatever else is ethically necessary to attract attention. If they are unwilling to do so, the opportunities will simply pass them by. It's like the old question "If a tree falls in the forest and no one hears it, does it really make a noise?" If your prospects don't know what you offer and what you can do for them, how can you possibly help them?

#### **Self-promotion isn't all bad**

When I say self-promotion, what immediately comes to mind? Do you think of that slick guy down the hall who is loud and always telling everyone how great he is? Or the old boss you had who was totally incompetent but had somehow convinced someone that he knew what he was doing? It is important to ponder this. Are you not effectively promoting yourself because you don't want to be perceived like these obnoxious people? If so, you're blocking yourself by identifying self-promotion as a negative. These people have nothing to do with effective self-promotion.

The good news is you don't have to become a loudmouth to be effective at self-promotion. You don't have to be boisterous or obnoxious or even a big extrovert. But you do have to develop confidence and learn to take the lead when it's appropriate. People who promote themselves do not hang back. They do what they need to do to create visibility:

1. They position themselves and make sure they get noticed. They fully utilize their existing contacts and networks and are always developing new ones. Not only do they get noticed, they make sure they are remembered. They do



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something distinctive to get remembered.

2. They have style. What's unique about your style? Background? Hobbies? Experience? Hair? Your golf handicap? Neckties? Eyeglasses? Sincere approach? Follow-up? Sense of humor? Volunteerism? The fact that you convey you are here to serve your clients and not yourself? Is there anything about your style that is not serving you? Are you following up? Staying in touch? Keeping your word? Adding value?
3. They demonstrate consistency. This is probably the most important key of the three. Natural self-promoters never leave self-promotion to chance. They know that a lost opportunity will go to one of their competitors. They repeatedly show up even if they are not in the mood! In his book *Good to Great*, Jim Collins says that the "signature of mediocrity is chronic inconsistency."

### **Feel the fear and do it anyway**

When it comes to self-promotion, most FAs fight an emotional battle between the desire to promote themselves to prospects and the fear of appearing immodest. Anytime you are in fear, you shrink. And when you are in fear, just notice who you are thinking about at that moment. Surprise! I'll bet you're focused on you, not on the prospect. Here are three ways to manage your fear and let prospects know how you can help them:

1. Become aware that you are hesitating. Hiding, denying, and rationalizing your fear is detrimental and gets you nowhere. You must pinpoint exactly what your fear is. Are you thinking, "My prospects may think that I am a money-grubbing sales guy" or "I don't want them to think that I am contacting them to get their business"? You cannot work through obstacles unless and until you identify them. The fear of self-promotion is nothing to be embarrassed about, but needlessly living with it is.
2. Assess current attitudes and behaviors. You can take some time to do an inventory on how you stack up when it comes to self-promotion. It's often helpful to have an outside opinion when doing this kind of assessment, since it's difficult to see our own weaknesses. A coach may be able to offer an objective assessment that pinpoints your self-promotion issues.
3. Take action in the areas where you are uncomfortable. The final step is to apply proven techniques to overcome your particular fears. Again, a coach can be helpful in changing your behaviors.

### **Overcoming your fear of self-promotion**

One strategy to overcome your fear of self-promotion is powerful and simple: Recognize your unique value and let it empower you.

The only way you are going to eliminate your fear is to become convinced of your value. Then you will prospect with a sense of entitlement. No, I didn't say a sense of arrogance. A sense of entitlement means that you are worthy of consideration because of your education, experience, expertise, credentials, etc.

You can work on this at two levels. First, take an inventory of what you have to offer as a qualified professional. If you're not convinced of the value you provide, this Horsemouth article will certainly help: "80 Things You Do for Clients." Get grounded in the benefits your clients get from working with an experienced FA.

Second, get personal. Answer this question: What is your unique contribution? List the qualities that make you worthy of an appointment. Why you? Dig deep. Spend some time soul searching. List the benefits of your expertise. Keeping your personal strengths in front of you will give you a new perspective on you. Once you are convinced that you are valuable, the process of self-promotion is much easier because you are sold on you. You will not feel like an unwanted interruption. You must be sold on your value before you can ever begin to sell someone else!

The dream-come-true business is when you have several clients and referral sources out there promoting you! Once you learn how to promote you, you can teach your clients and referral sources how to effectively promote you too!

Remember, if you don't toot your own horn, there will be no music.

I challenge you to get to the bottom of this now. Ask your ego to go to lunch and get real with yourself! It's worth it!

*Connie Kadansky is a consultant, speaker, and trainer specializing in Overcoming Sales Call Reluctance®. She offers effective tools and training to diagnose call reluctance and assists salespeople in highly profitable prospecting. Connie*

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