



The Emotionally Intelligent Advisor

Increase your success with stronger EI

FPA Puget Sound – Sept 20, 2024



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Executive Coaching for Team Effectiveness

Learning Objectives

- A clear understanding of the definition and four domains of emotional intelligence
- Why EI is so important to building relationships both personally and professionally
- Actionable ways to work on developing the skills of emotional intelligence to increase outcomes relative to client service and business development.



Liv Olson, ACC

For almost 20 years Liv Olson led Human Resources and People Operations for mission-driven financial services organizations. During this period, her organization was named among Washington's best workplaces for nine consecutive years.

Today, she works with individuals and teams to unlock and leverage core elemental skills and insights that, until now, have remained hidden. Using intentional yet flexible Team Elements structures she draws out the issues that will truly make the most significant difference.



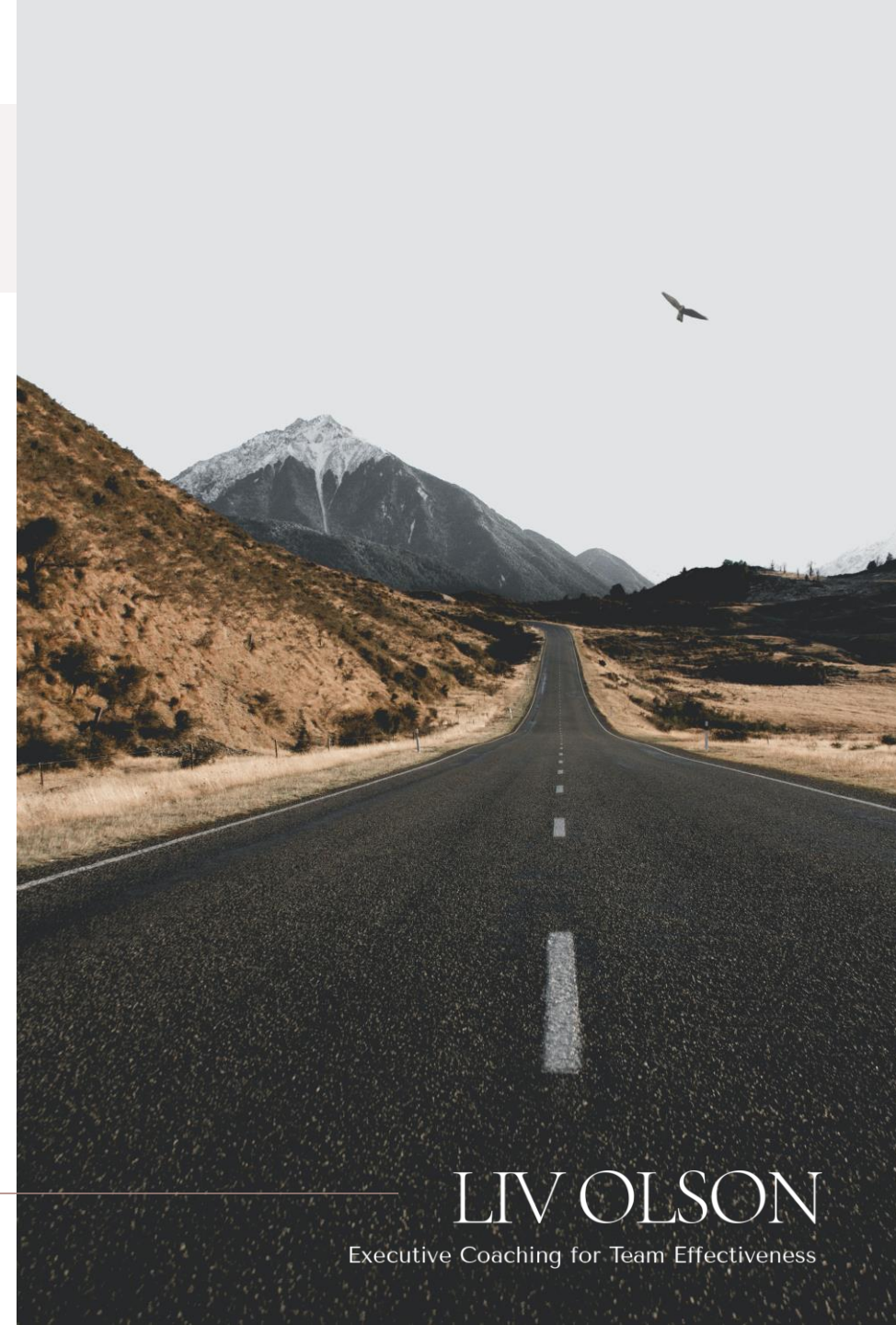
The Result: Unhelpful old patterns give way to an improved, empowered, fresh & effective new reality.

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Today's Roadmap

01. Introduction & Context
02. Why Care About Emotional Intelligence
03. Define & Explore EI Model
04. EI in Relationship
05. Tools to Develop EI Skills



ENERGY

ENRAGED	PANICKED	STRESSED	JITTERY	SHOCKED	SURPRISED	UPBEAT	FESTIVE	EXHILARATED	ECSTATIC
LIVID	FURIOUS	FRUSTRATED	TENSE	STUNNED	HYPER	CHEERFUL	MOTIVATED	INSPIRED	ELATED
FUMING	FRIGHTENED	ANGRY	NERVOUS	RESTLESS	ENERGIZED	LIVELY	ENTHUSIASTIC	OPTIMISTIC	EXCITED
ANXIOUS	APPREHENSIVE	WORRIED	IRRITATED	ANNOYED	PLEASED	HAPPY	FOCUSED	PROUD	THRILLED
REPULSED	TROUBLED	CONCERNED	UNEASY	PEEVED	PLEASANT	JOYFUL	HOPEFUL	PLAYFUL	BLISSFUL
DIGUSTED	GLUM	DISAPPOINTED	DOWN	APATHETIC	AT EASE	EASY GOING	CONTENT	LOVING	FULFILLED
PESSIMISTIC	MOROSE	DISCOURAGED	SAD	BORED	CALM	SECURE	SATISFIED	GRATEFUL	TOUCHED
ALIENATED	MISERABLE	LONELY	DISHEARTENED	TIRED	RELAXED	CHILL	RESTFUL	BLESSED	BALANCED
DEPRESSED	DESPONDENT	SULLEN	EXHAUSTED	FATIGUED	MELLOW	THOUGHTFUL	PEACEFUL	COMFORTABLE	CAREFREE
DESPAIR	HOPELESS	DESOLATE	SPENT	DRAINED	SLEEPY	COMPLACENT	TRANQUIL	COZY	SERENE

PLEASANTNESS

Credit: Marc Brackett Permission To Feel (2019)



Questions for you

- What is your level of Emotional Intelligence knowledge?
- What is your level of experience applying it to client service?
- What is your level of experience applying it to business development?

- What are your most significant professional responsibilities and goals?

WHY SHOULD WE CARE ABOUT EI?

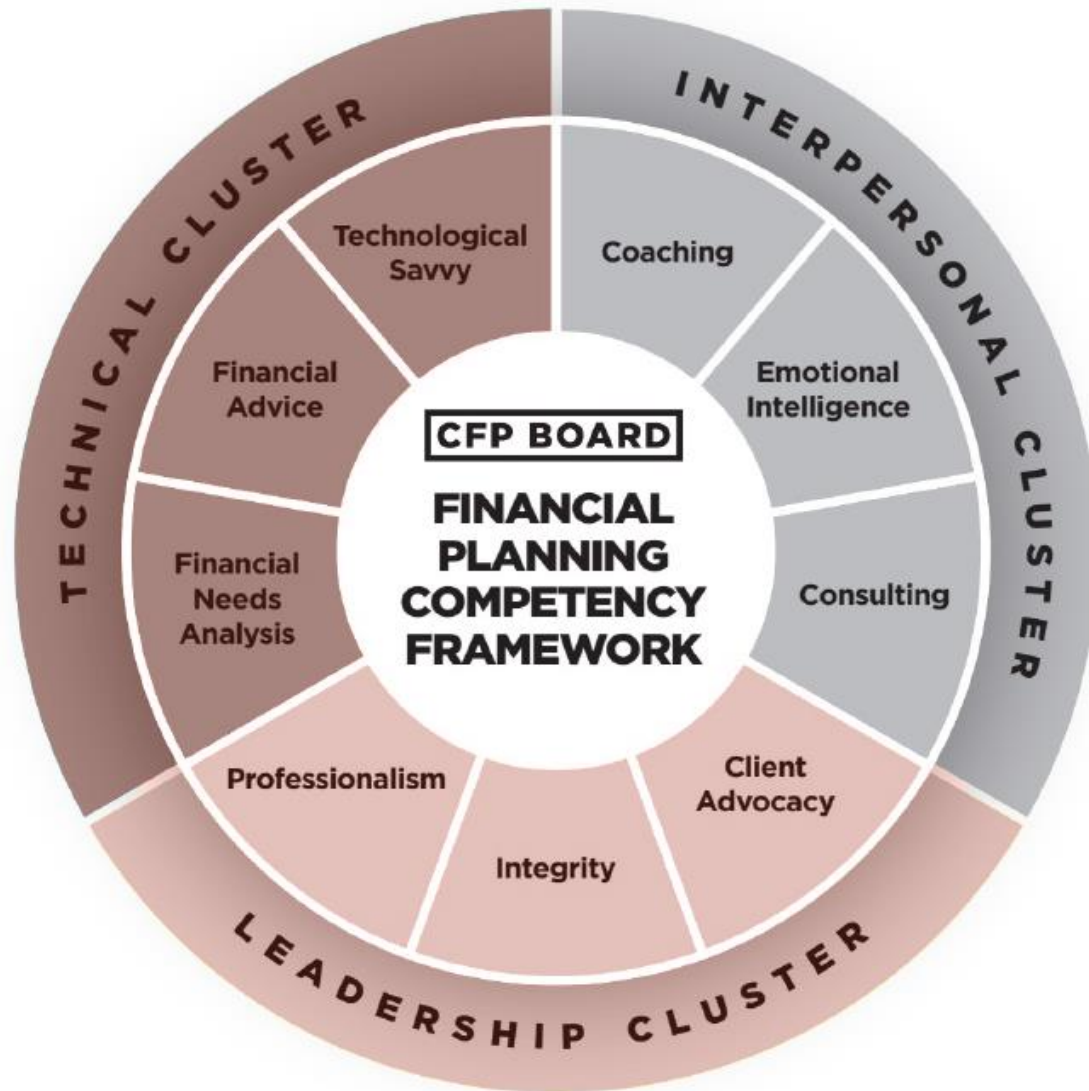
01. If we agree being an advisor is a relationship business, having strong EI is essential to forming and maintaining relationships.
02. People good EI are 80% more likely to succeed.
03. Life and work is inherently full of friction. EI helps navigate those choppy waters with greater dexterity.
04. Those with strong EI have a better relationships with themselves and others.
05. If you don't believe me, you can take the CFP Board's new competency model as proof it's important.



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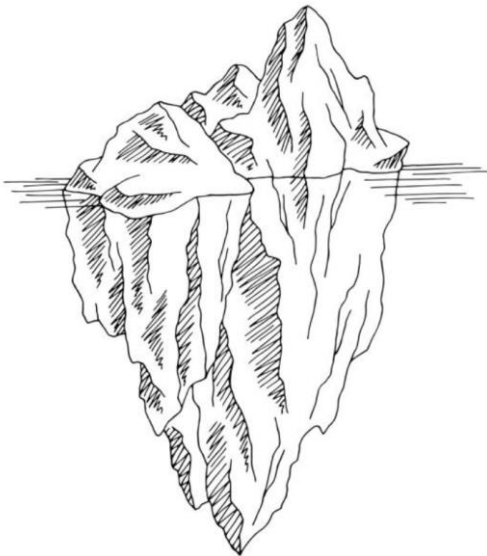
CFP Board Competency Model



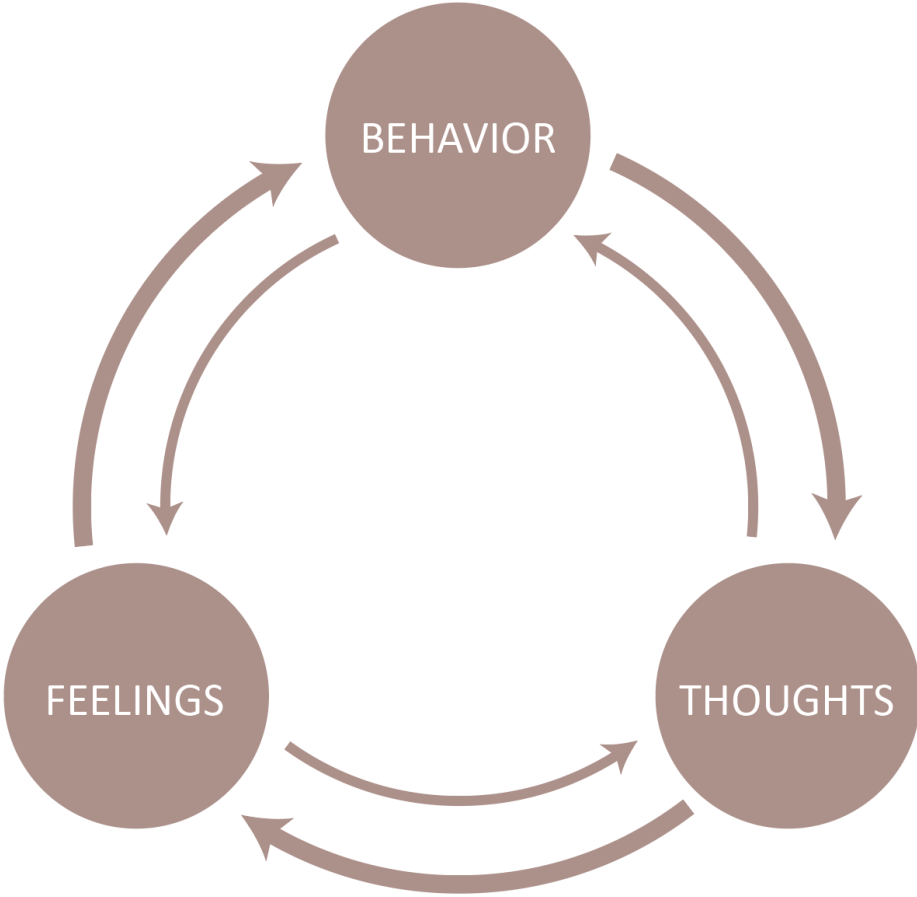
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We are human: Think, Feel, Behave Cycle



Emotions
Somatic
experience
Intuition



Think, Feel, Act, Behave Cycle

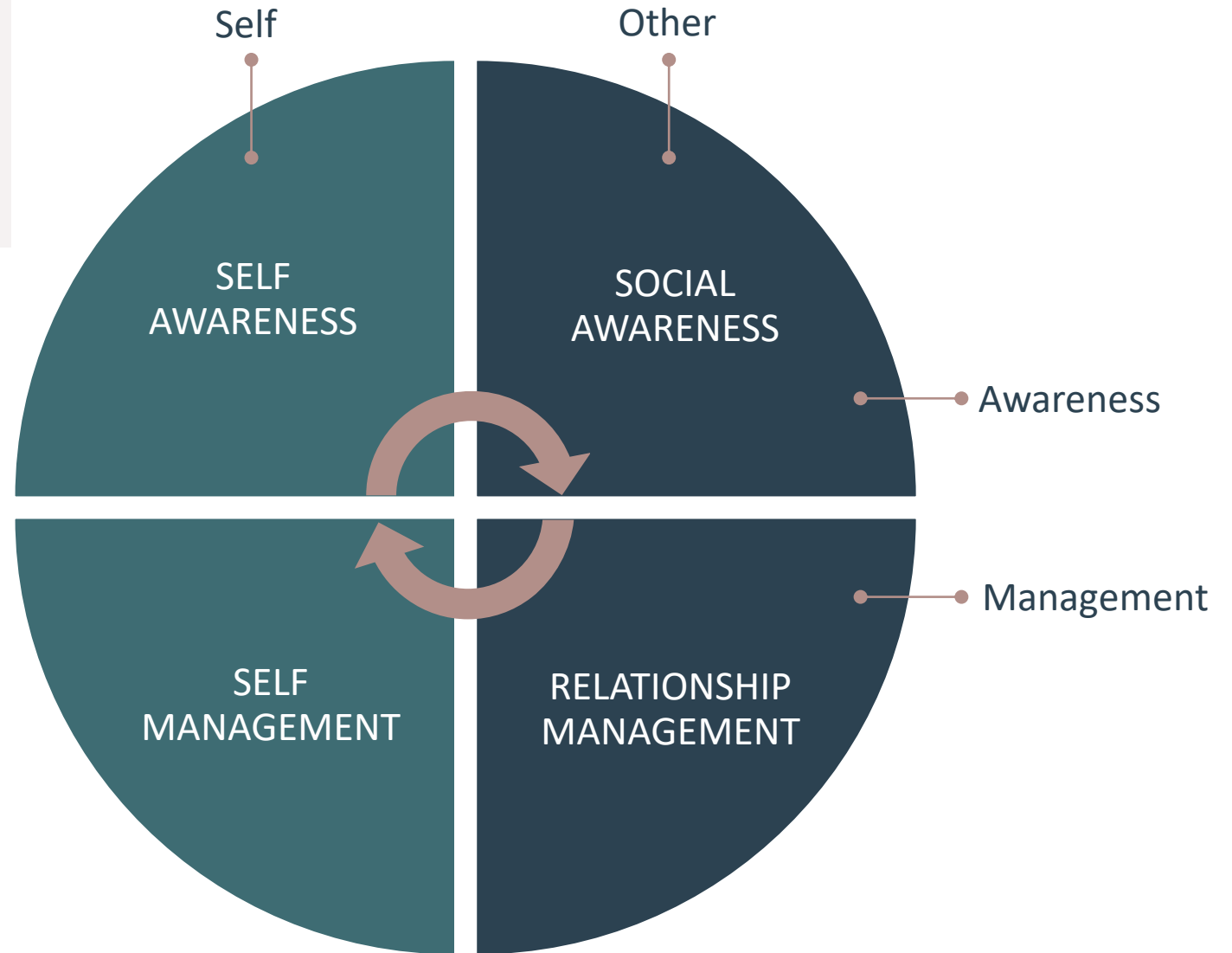
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Emotional Intelligence Model

EMOTIONAL INTELLIGENCE:

The capacity to recognize and manage our own feelings and to recognize and respond effectively to those of others.



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Daniel Goleman

	DEFINITION	HALLMARKS
1. Self Awareness	The ability to recognize and understand your moods, emotions and drives as well as their effect on others	<ul style="list-style-type: none"> • Self Confidence • Realistic Self Assessment • Growth Mindset
2. Self Management	The ability to control or redirect disruptive impulses and moods. Ability to suspend judgement – to think before acting	<ul style="list-style-type: none"> • Trustworthiness and integrity • Comfort with ambiguity • Openness to change
3. Social Awareness (empathy)	The ability to understand the emotional make up of other people Skill in treating people according to their emotional reactions	<ul style="list-style-type: none"> • Optimism • Cross Cultural Sensitivity • Service to clients and customers
4. Relationship Management (social skill)	Proficiency in managing relationships and building networks. An ability to find common ground and build rapport.	<ul style="list-style-type: none"> • Effectiveness in leading change • Persuasiveness • Expertise in building and leading teams

COMPONENTS OF EMOTIONAL INTELLIGENCE AT WORK, HBR

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Stories from the field ...



Business Development



Client Service



Team Relationships



“ These skills are critical for a financial advisor. You can see the less strong advisors when they are leaning on performance versus leaning on the problem of the **felt experience.** ”

“ An emotionally intelligent advisor is able to say that we aren't going to plateau in the client relationship because we going to **keep going deeper.** ”

“ Mostly it's a life coach role. If this relationship is achieved, they will not be leaving barring some big catastrophe. People want to someone **to know how they feel.** ”

“ I have become a better advisor by doing business development. Money is a deeply emotional topic. As I retell a story over and over, I’m able to pull out more and more planning opportunities. ”

“ Emotional Intelligence for me is spending time reflecting on how my actions are being received. It’s all about the client prospect and how they feel. ”

“ As our EI grows, BD comes a natural consequence. It becomes effortless. ”

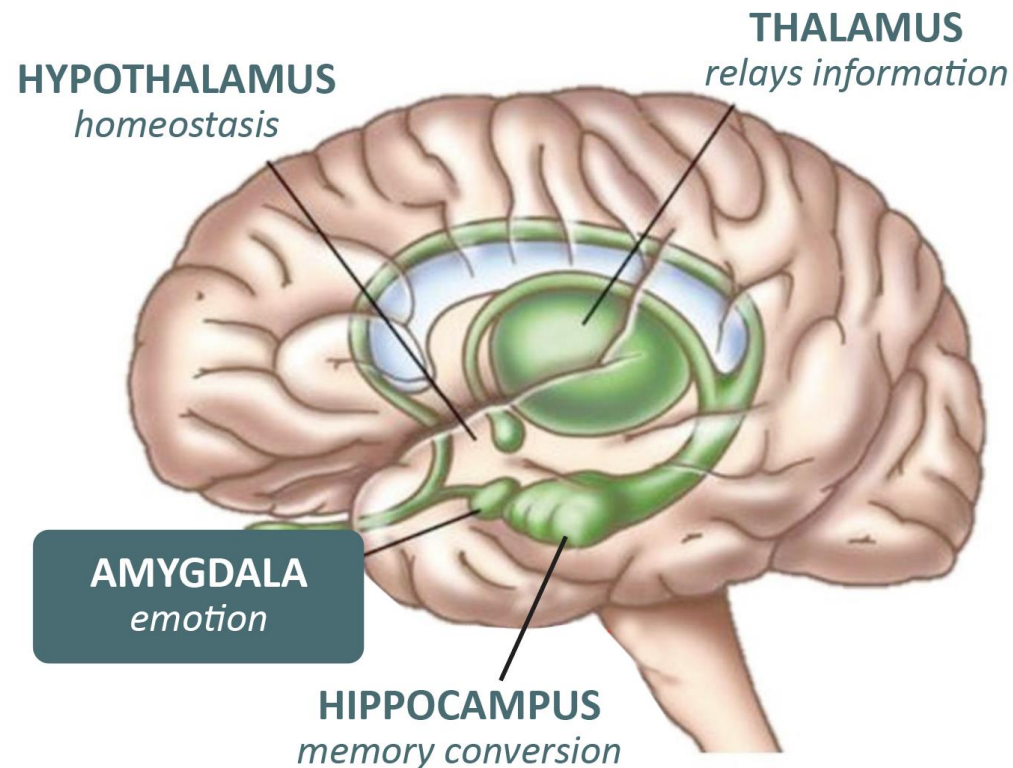
“
We are not
thinking machines
that feel, rather
we are feeling
machines that
think”

Antonio Damasio,
Neuroscientist



Photo by [CH Claudio Schwarz](#) | [@purzlbaum](#) on [Unsplash](#)

Neuroscience



Emotions predate reason.

Feelings came before thinking.

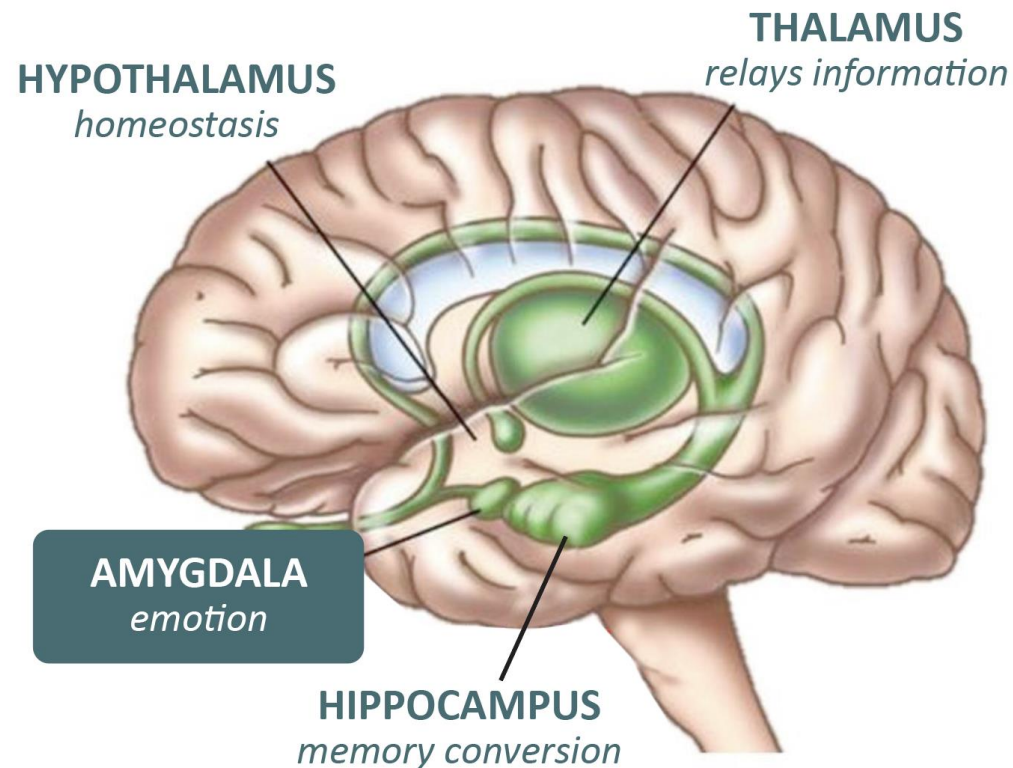
3 signs of an amygdala hijack.

1. Strong emotional reaction like rage or fear or numbness...something not appropriate for situation
2. The reaction is triggered very quickly
3. Later some degree of regret.

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Neuroscience



Our Goal is to have an Intentional Response vs Reaction

2 reasons you might not be able to access intentional responses:

1. When you're emotionally charged, biology kicks in: blood to digestive tract, muscles and limbs tense in prep to flee or fight, heart rate increases, adrenaline is released and clarity of thought is compromised.
2. Lack of practice of the skills and behaviors. Need to embed them in long term memory

What is the Data Saying?

75%

75% of careers are derailed for reasons related to emotional competencies, including inability to handle interpersonal problems; unsatisfactory team leadership during times of difficulty or conflict; or in ability to adapt to change or elicit trust”

80%

As much as 80% of adult ‘success’ comes from EI.

2X

On average, emotional intelligence was twice as important as cognitive ability in terms of distinguishing competencies

80-100%

For top leadership positions 80%-100% of the competencies that set apart their star leaders are based on EI

78%

Leaders LOW in EI, created negative climates 78% of the time.


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A close-up photograph of a hand holding a tangled string of warm white LED lights. The lights are glowing and creating a bokeh effect in the background. The overall tone is warm and reflective.

Pause & Reflect:

What are your most significant professional responsibilities and goals?

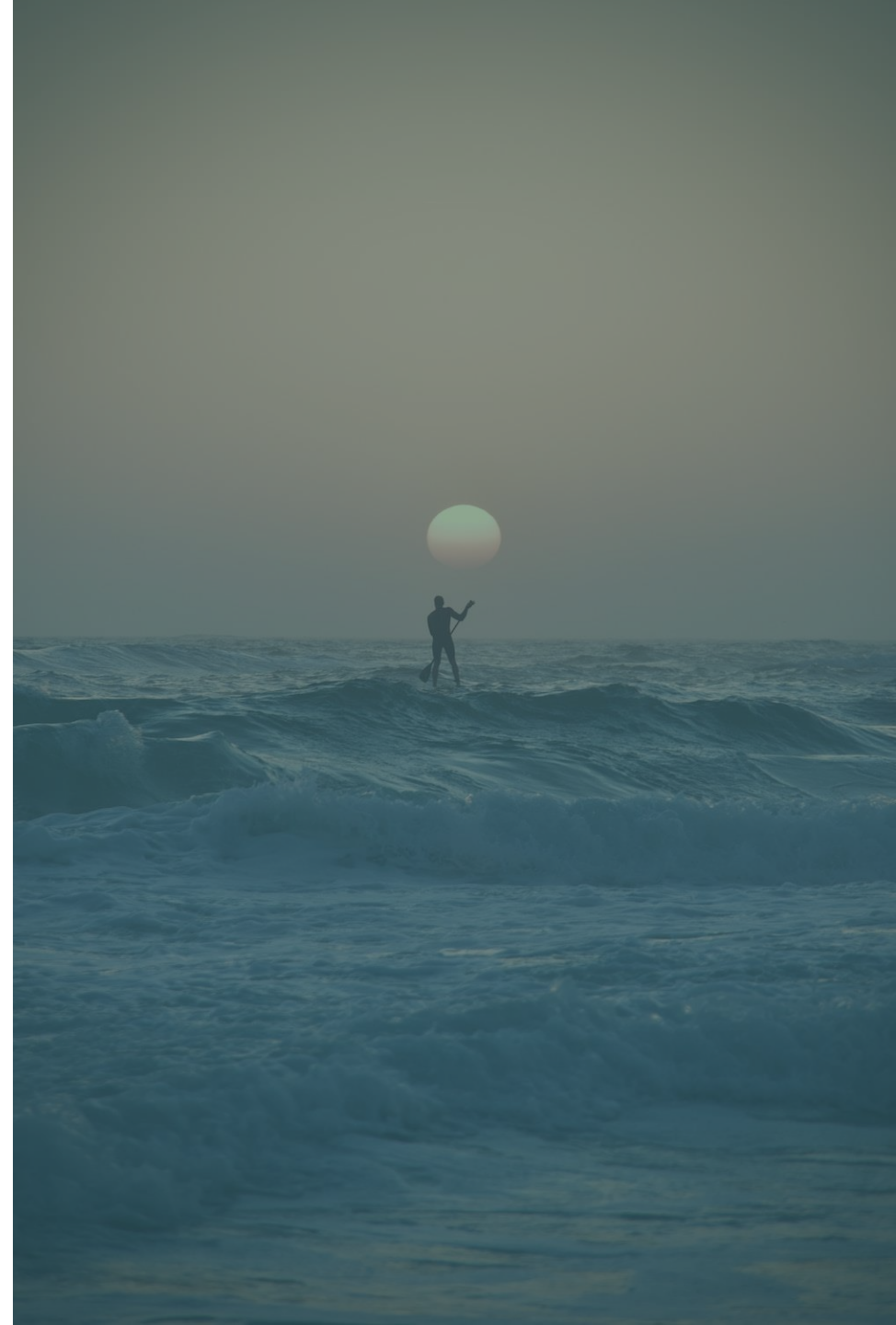


“You can only be as deeply
connected with other people as
you are with yourself.”

Brené Brown

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Where would you start?

EMOTIONAL INTELLIGENCE:

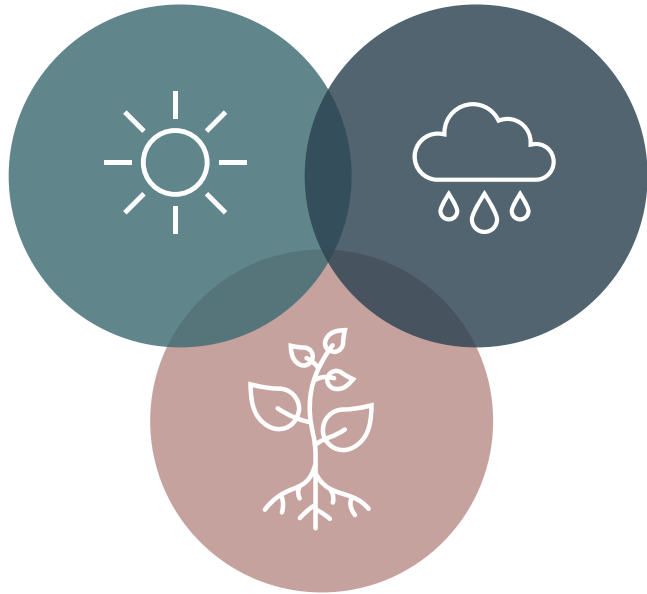
The capacity to recognize and manage our own feelings and to recognize and respond effectively to those of others.



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Emotional Intelligence Model



Recognizing,
knowing and
accurately
naming your
emotions



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Self Awareness

How many emotions to most people say they have?

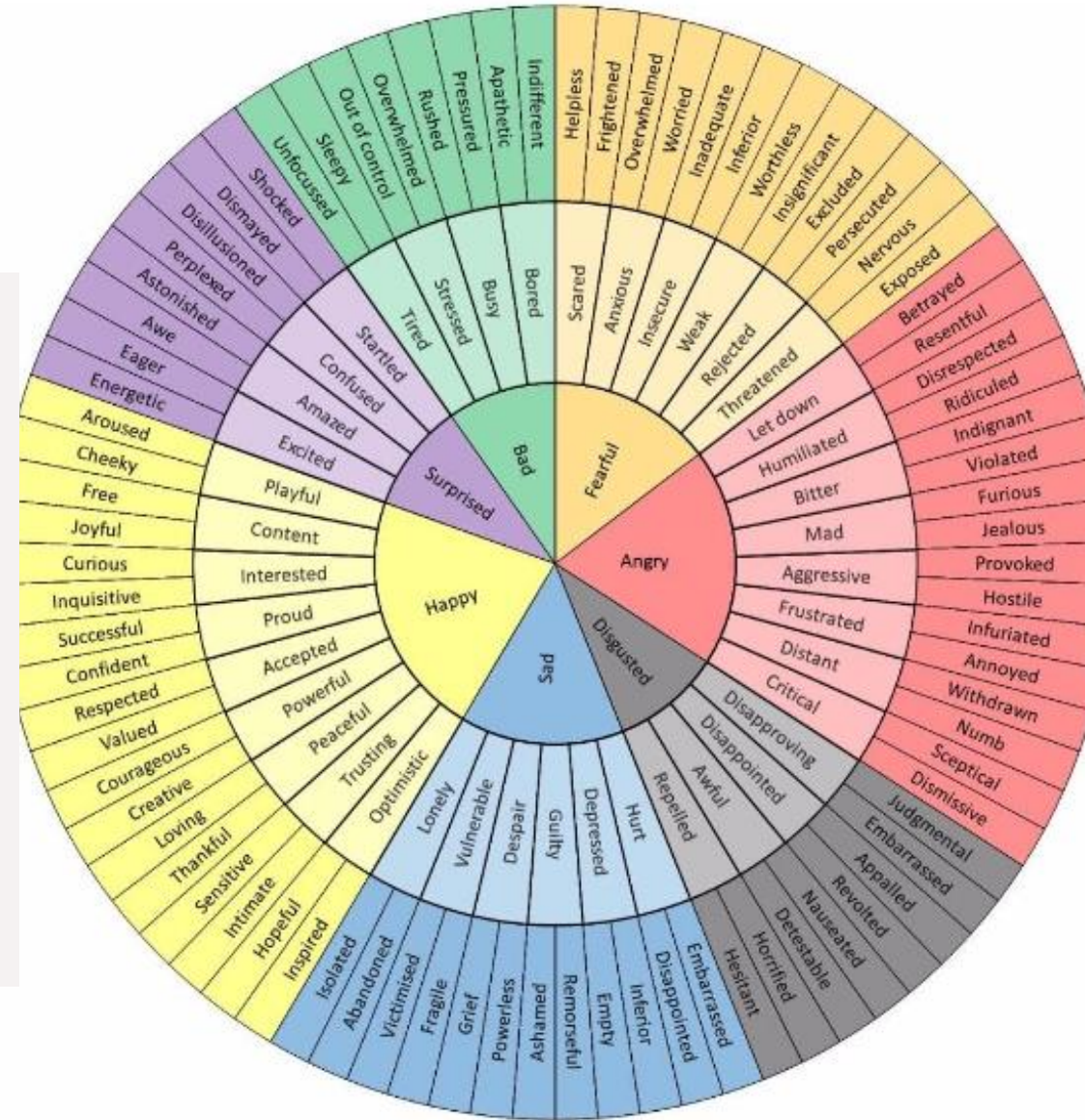
3

What is our framework for self awareness?

Language

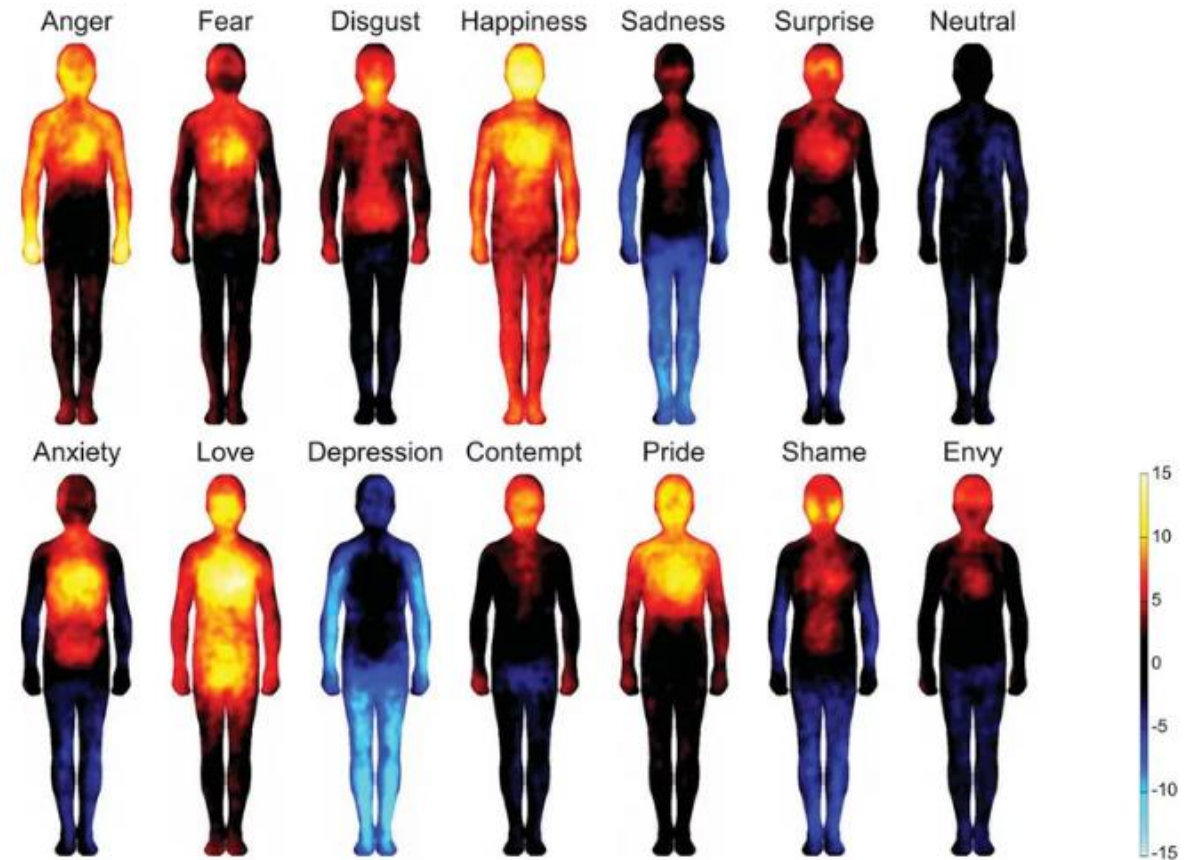
What are the two ingredients of emotions?

1. Felt experience in your body
2. What you call it



Self Awareness

Our body knows before we have cognitive awareness what emotions are happening. The more we can attune to what's happening to our body, the earlier we can be aware and choiceful about emotions.



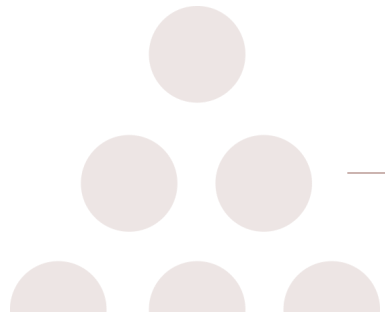
2014 Finish Study by Neuroscientist Lauri Nummenmaa

Self Awareness

All emotions are a natural part of being human.

Each emotion has a **gift**.

FEELING	THE GIFT IT BRINGS
Anger	Direction, motivation, and boundary setting
Anxiety	Clarity
Fear	Protection against harm
Joy	Emotional vitality—zest for living and involvement in life
Love	Warmth, caring for others
Sadness	Sensitivity to others' loss as well as one's own
Shame	Humility—knowing that as human beings we have limits and are “perfectly imperfect”




STEPS OF SELF AWARENESS:

1. Intend to know what you are feeling
2. Naming feelings
3. Behavioral indicators

CULTIVATING SELF AWARENESS:

1. Identify emotions using a broad spectrum of emotion words. Develop an appreciation and practice of emotional granularity.
2. Get curious and notice how each emotion is affecting your body, thoughts and behavior
3. Take time to reflect on how I felt and what could I do differently
4. Get insights from others via instrument or work with a mentor or coach
5. Focused attention or mindfulness practices
6. Write / Journal each day



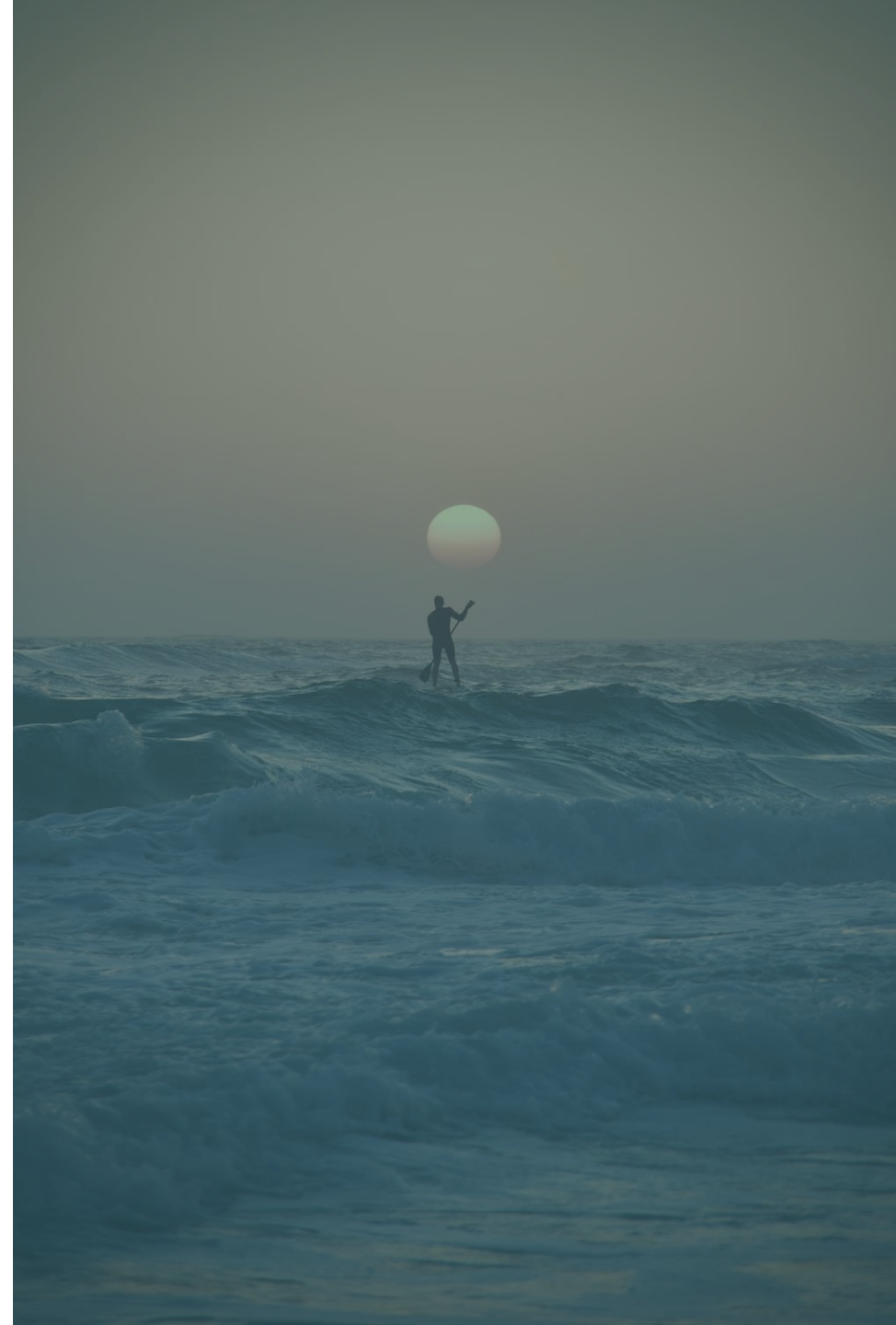


“The emotional brain responds
to an event more quickly than
the thinking brain”

Daniel Goleman

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Emotional Intelligence Model

Recognizing, knowing and accurately naming your emotions

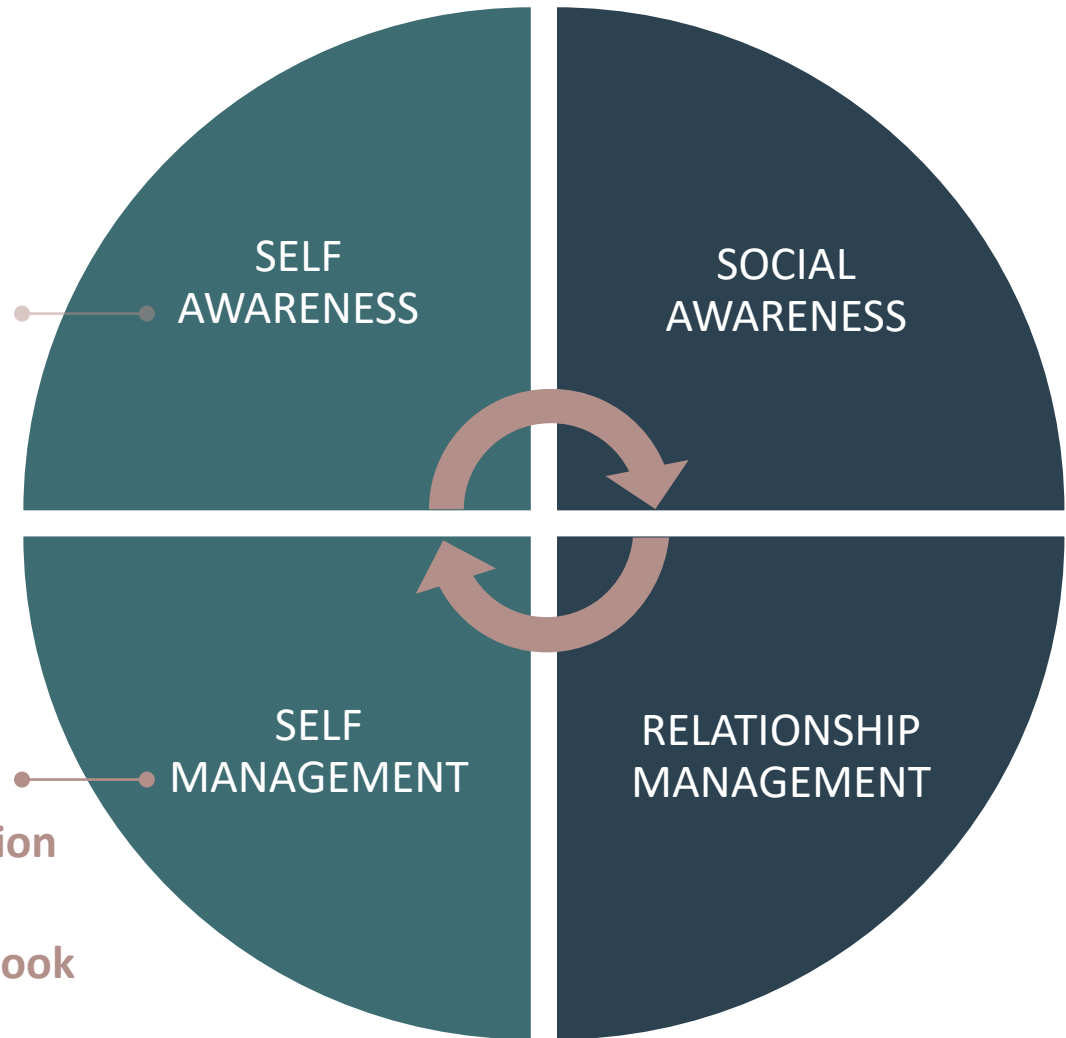
SELF AWARENESS

SOCIAL AWARENESS

Regulate emotions & Self-Motivation
Adaptability
Positive Outlook

SELF MANAGEMENT

RELATIONSHIP MANAGEMENT



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Self Management

Emotional Regulation

Motivation

Positive Outlook

Adaptability

Ability to regulate emotions and act with honesty and integrity in reliable and adaptable ways.

Resonant leaders and advisors don't let their moods seize the day: they use self management to navigate.

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Two kinds of emotional regulation

1. **Implicit (biological default)** – Our biology will help us regulate in face of fear.
 - Example: Stressful situation = holding breath.
2. **Explicit (intentional)** – voluntary and requires more effort. We have to help ourselves out.

“
We can't stop the waves of
the ocean, but we can
choose which ones to surf

”

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Self Management

Emotional Regulation

Motivation

Positive Outlook

Adaptability

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**“Where attention goes energy flows;
Where intention goes energy flows”**

James Redfield

Ability to see the positive in people, situations, and events. Persistence is pursuing goals despite set-backs and obstacles.

- Our brains bias us toward negativity as we scan for threat. 1:5 ratio
- Positive outlook leads to positive emotions. Greater performance, higher motivation, better client experience. Opposite is true.
- Truth: We don't have a ton of control over what we think and feel. We do have control over how we respond to the thoughts and feelings.


**STEPS TO GREATER
SELF MANAGEMENT
ARE:**

1. Slow down
2. Building pauses – give yourself time/distance
3. Name to tame
4. Exposure to things that might be activating

**CULTIVATING SELF
MANAGEMENT/
NAVIGATION:**

1. Identify emotions using a broad spectrum of emotion words. Develop an appreciation and practice of emotional granularity.
2. Reframe challenges to a positive outlook.
3. Take time to reflect on how I felt and what could I do differently
4. Get insights from others via instrument or work with a mentor or coach
5. Focused attention or mindfulness practices
6. Write / Journal each day



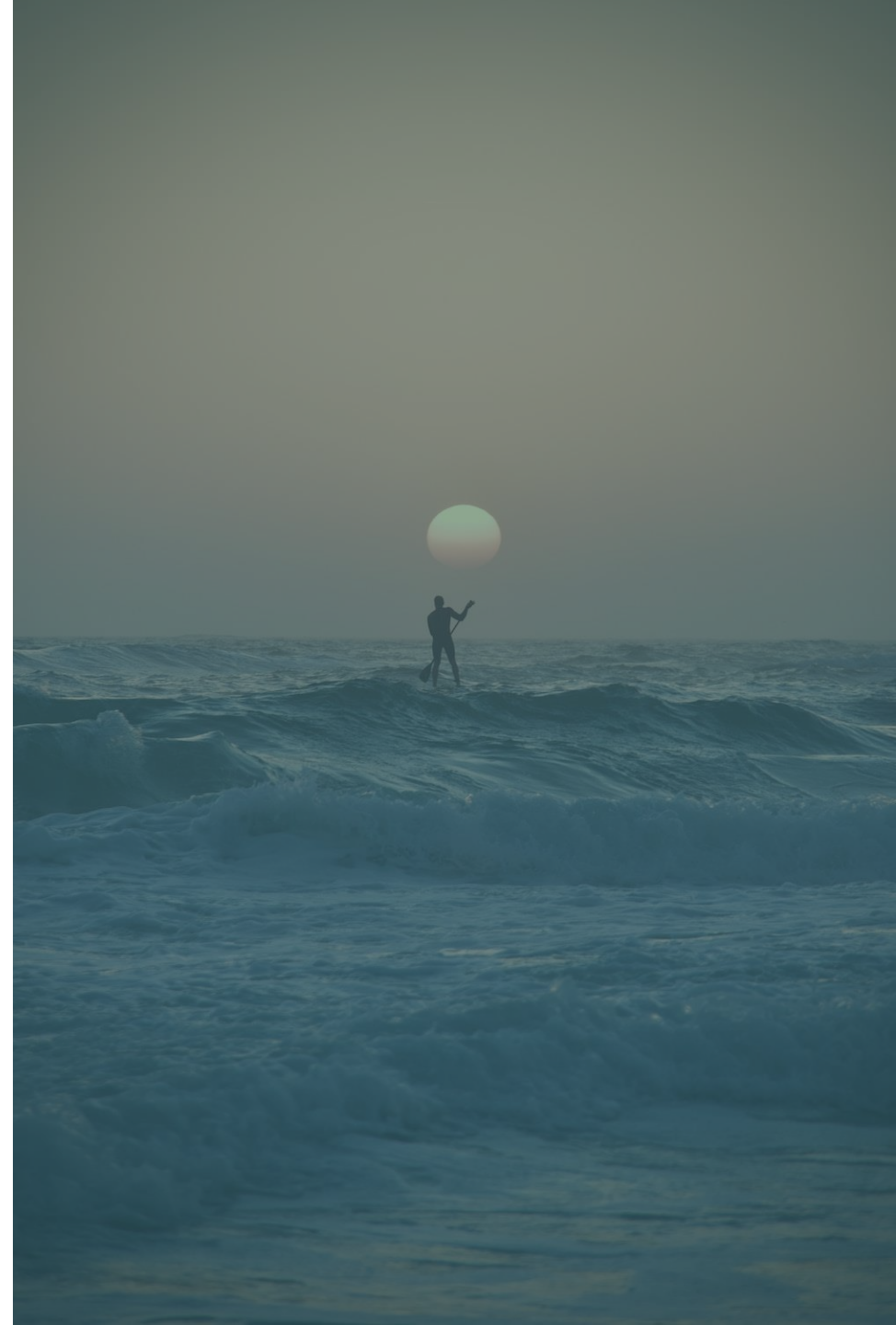


“Empathy fuels connection.
Sympathy drives disconnection”

Brené Brown

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Emotional Intelligence Model

Recognizing, knowing and accurately naming your emotions

SELF AWARENESS

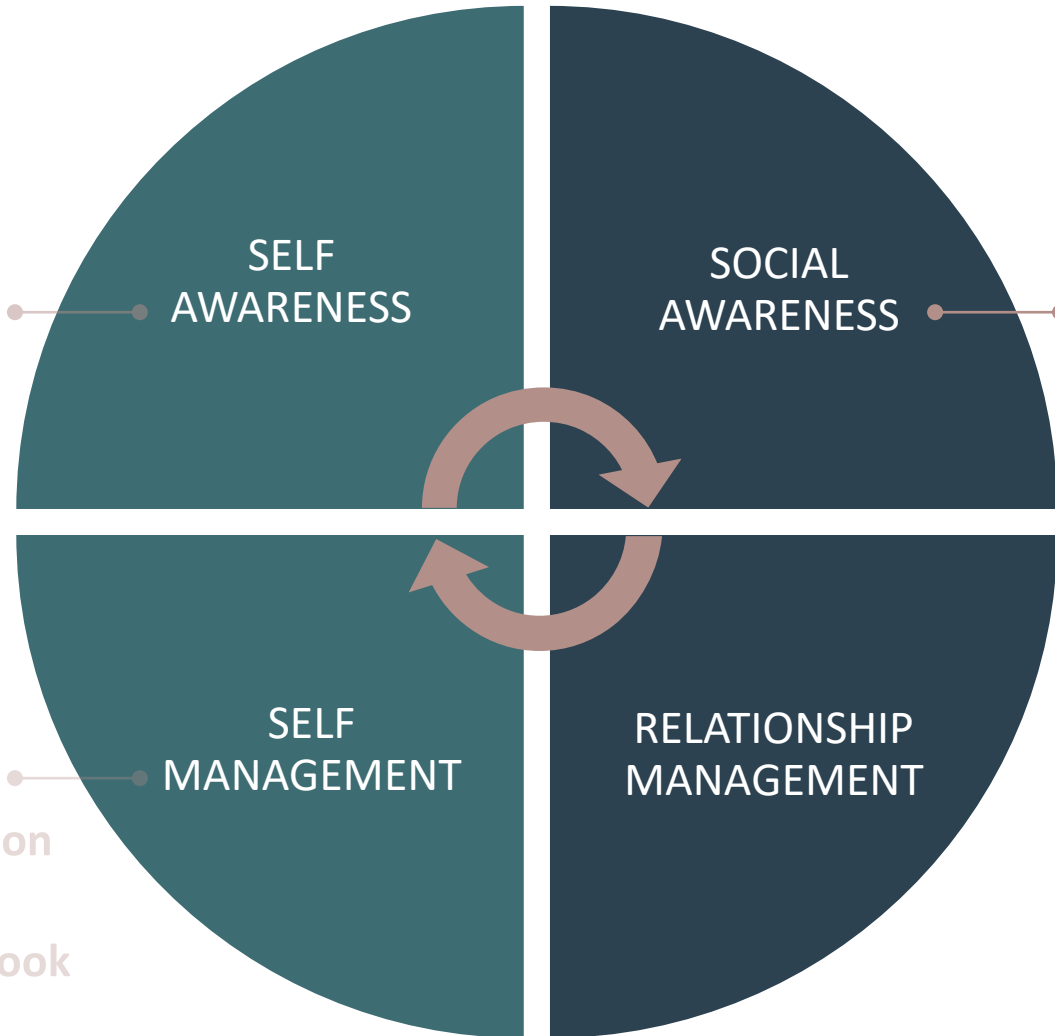
Empathy. Recognize & understand other people's emotions

SOCIAL AWARENESS

Regulate emotions & Self-Motivation
Adaptability
Positive Outlook

SELF MANAGEMENT

RELATIONSHIP MANAGEMENT



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Social Awareness

Empathy

- Ability to sense others' feelings and how they see things
- You pick up cues to what's being felt and thought
- You can sense unspoken emotions
- Listen attentively to understand someone's point of view
- Listen to UNDERSTAND vs listen to reply
- Difference btwn sympathy and empathy

Sympathy vs Empathy



Sympathy

- Having thoughts about what someone feels
- Giving unsolicited advice
- Passing judgement
- Only noticing the - surface level issue
- Understanding only from your perspective
- Ignoring your own emotions

	Sympathy	vs	Empathy
MEANING	→ Understanding others' pain.		Understanding others' pain.
PERSPECTIVE	→ Understanding from the listener's perspective.		Discovering and understanding from the sufferer's perspective.

Empathy

- Feeling what someone feels
- Actively listening
- Discovering their perspective
- Not judging
- Acknowledging the everyone's feelings

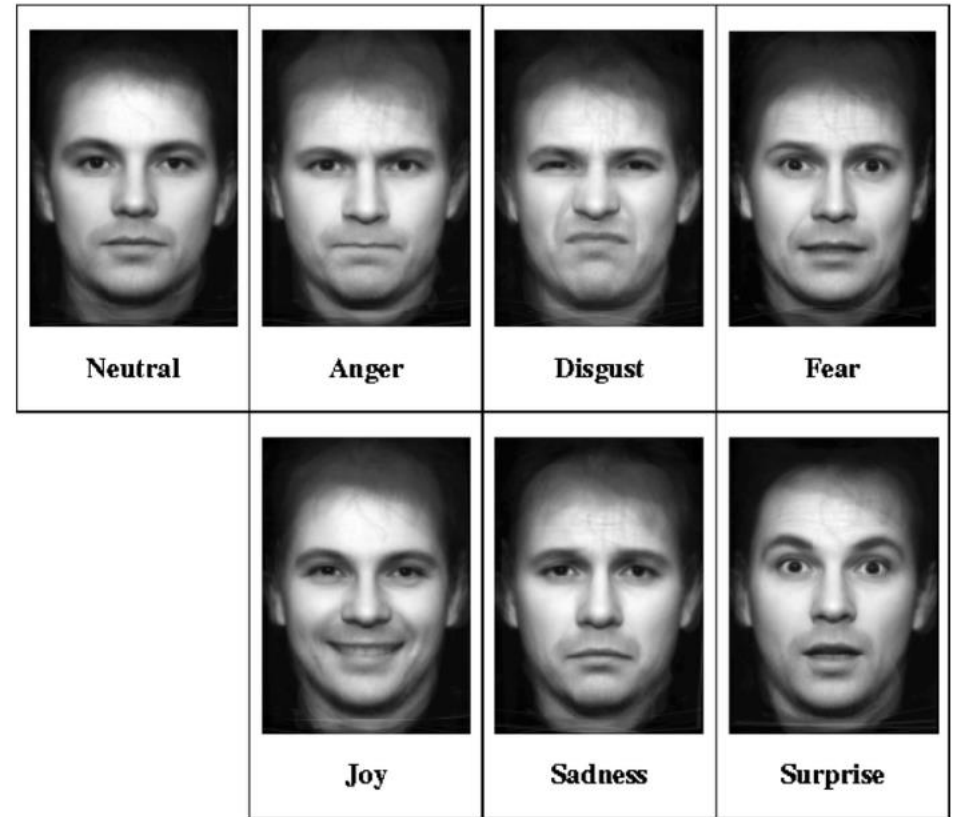
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Beyond the words:

01. Macro expressions
02. Micro expressions – facial expressions that occur within a fraction (1/25) of a second. They tend to represent nonconscious ‘leakage’ of true emotions.
03. Body language
04. Energy



Paul Ekman Group


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CULTIVATING SOCIAL AWARENESS /EMPATHY:



1. Ask questions with genuine curiosity
2. Be fully (physically, mentally, emotionally) present & make eye contact
3. Active listening to understand
4. Acknowledge the feelings of others
5. Use their words in reflective responses
6. Get insights from others via instrument or work with a mentor or coach
7. Focused attention or mindfulness practices



“You can make more friends in two months by becoming interested in other people than you can in two years by trying to get other people interested in you.”

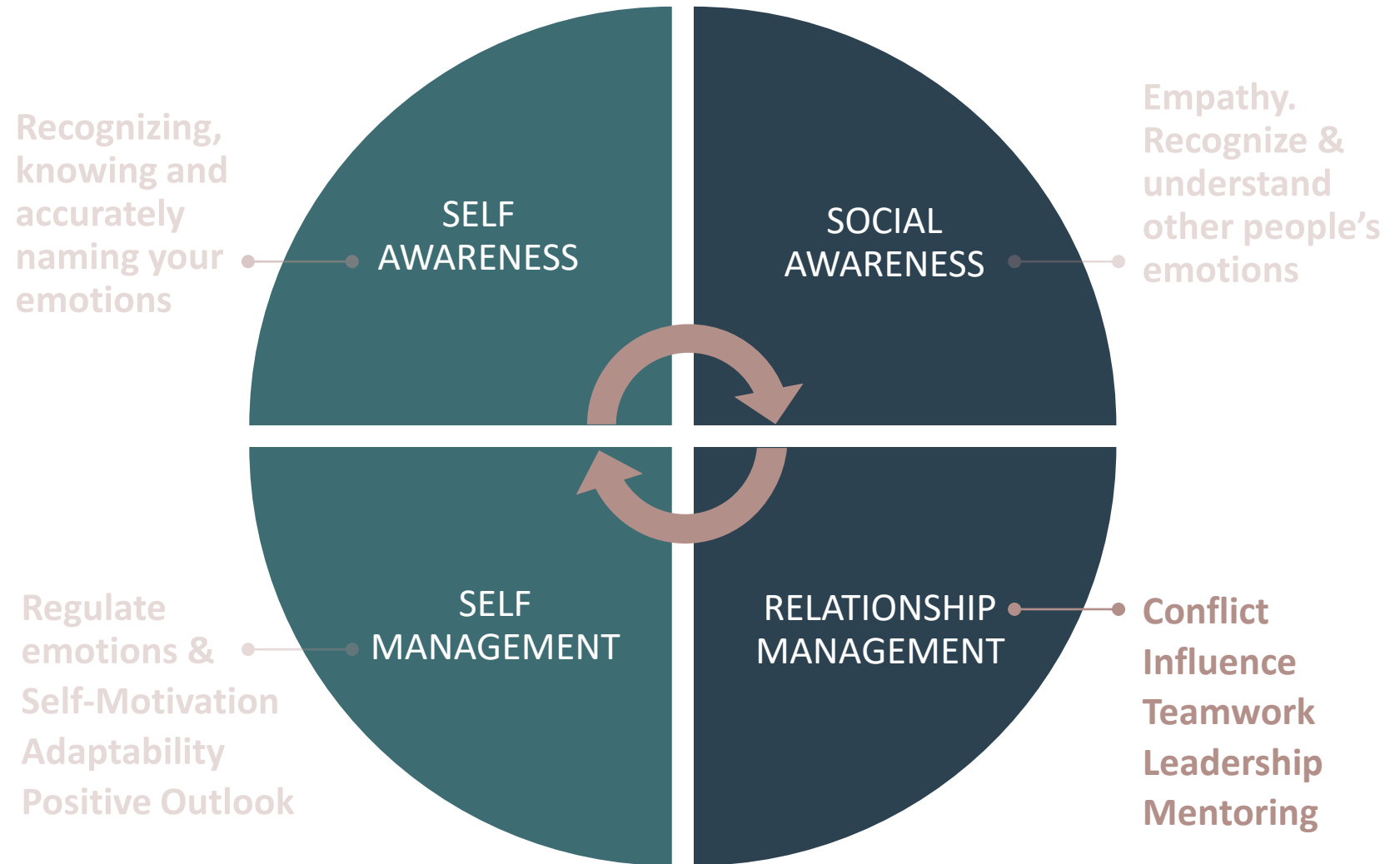
Dale Carnegie

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Emotional Intelligence Model



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Relationship Management

Influence

Conflict Management

Inspirational Leadership

Coaching and Mentoring

Teamwork

Influence is the ability to have a positive impact on others, to persuade or convince them to gain their support. With the Influence competency, you're persuasive and engaging and you can build buy-in from key people.

I anticipate questions while invoking thought and emotion

Attune to how they feel as I'm answering questions

I stay motivated by staying connected to the goal

You have to know what the other person wants, needs and is motivated. I shape proposals for each person in this way

I can attune and track what's going on in a room

Building Trust, Rapport and Empathy – 10 Open Ended Questions

01. What has been on your mind lately?

02. What's been going on in your life that's been challenging?

03. What usually helps in situations like this?

04. What's your perspective on this issue?

05. Can you describe a time when you felt this way before?

06. What is helpful for me to understand better about your situation?

07. What do you think might help you feel better or more supported right now?

08. How can I be there for you in this moment?

09. Is there anything else you'd like to share that you think would help me understand your point of view?

10. How might we move forward from here?



Relationship Management

Conflict Management

Influence

Inspirational Leadership

Coaching and Mentoring

Teamwork

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Conflict Management (“Perspective Navigation”) competency involves having the ability to help others through emotional or tense situations, tactfully bringing disagreements into the open, and defining solutions that everyone can endorse.

Research shows ‘hot conflicts’ include:

- Persisting in arguing the same points repeatedly
- Personal accusations are made

Conversely, healthy relationships and high performing groups:

- Work to surface simmering *relevant* disagreements and
- Deal with them constructively

Help yourself
say what's not
being said

Calm Truth
Telling

Manage your
emotions or
your emotions
will manage you

RELATIONSHIP MANAGEMENT:



“You have to force yourself to spend some time away from the hustle and bustle of your job in order to get down to reality again.” CEO Richard Abdo (Wisconsin energy)

1. What would have been a better response for my reaction to the client’s question?
2. What could I do differently next time?
3. Who do I need to ask for help and perspective?
4. What do I need to do well and repeat consistently?
5. Get insights from others via instrument or work with a mentor or coach
6. Focused attention or mindfulness practices
7. Write / Journal each day

EI in Relationship

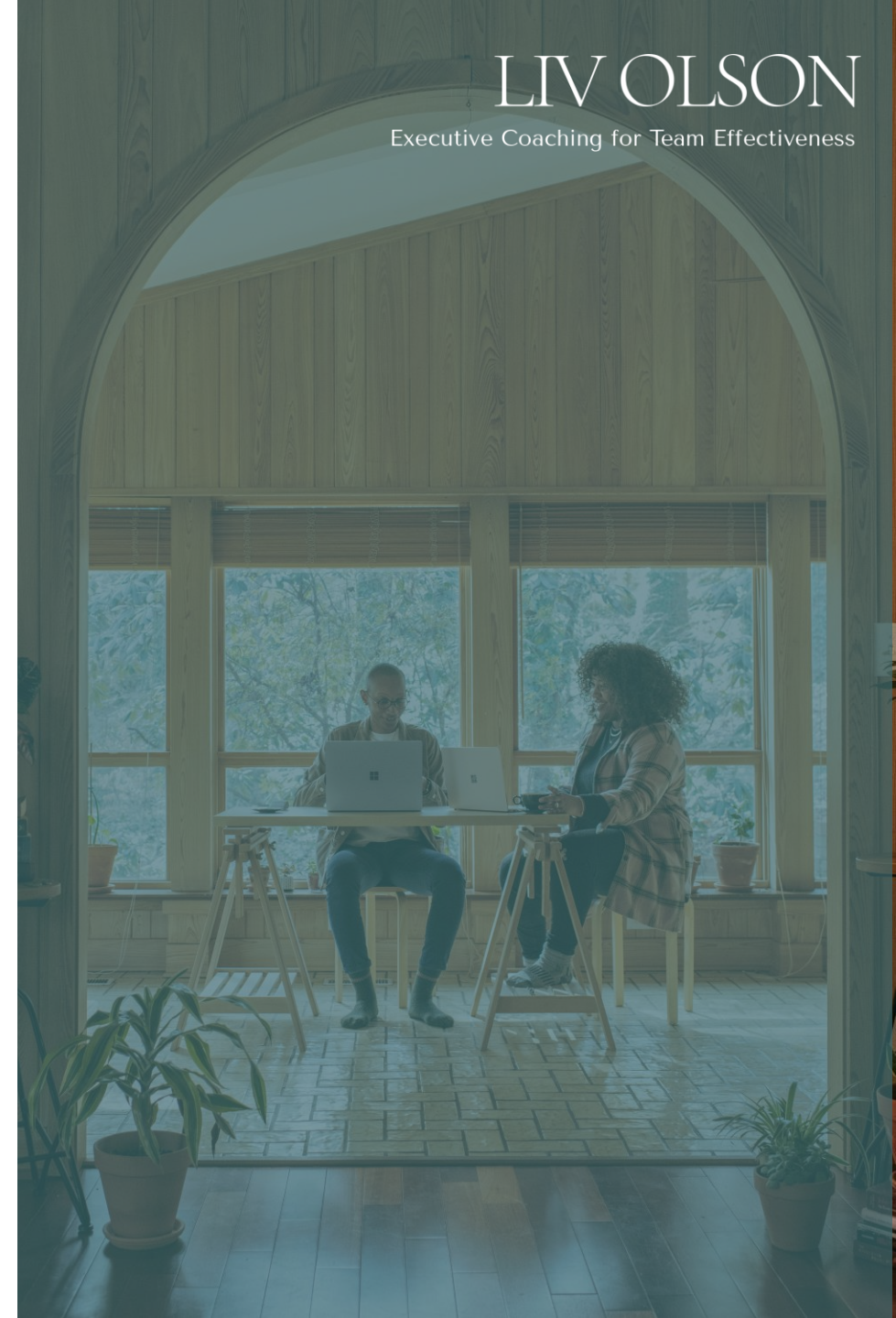
Connection is the #1 key for health, longevity and happiness

Accessing the whole range of feelings is critical

Emotion is the make up of our biology, biography, behavior and back story

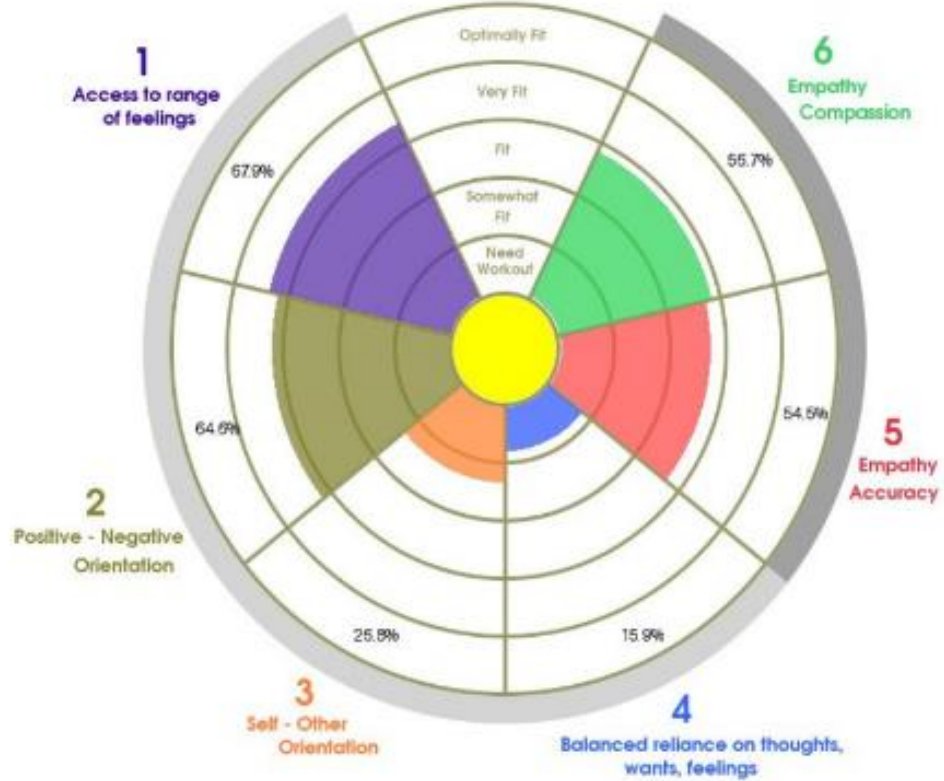
Our emotions have information and gifts. When we understand our default better, we can are able to navigate more skillfully and direct our attention to where

We-I Profile assessment

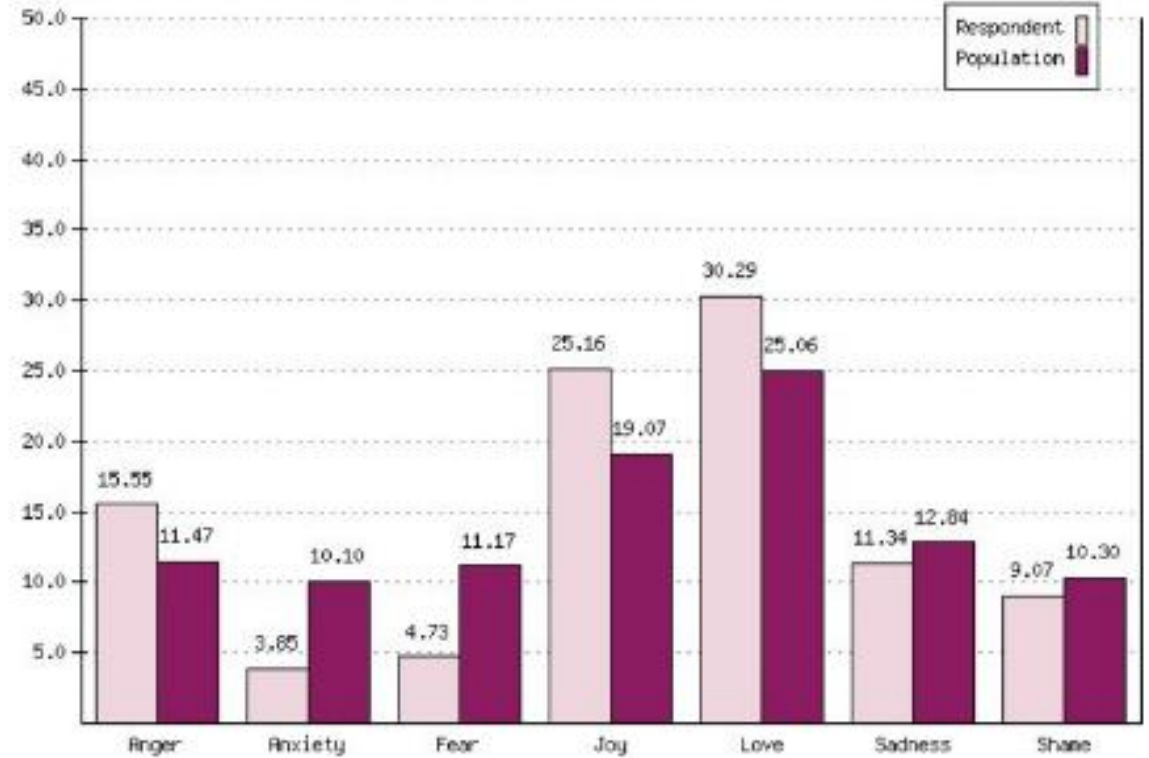


Your Fitness Profile

Six Dimensions of Self-Reflection & Empathy



Feelings Distribution



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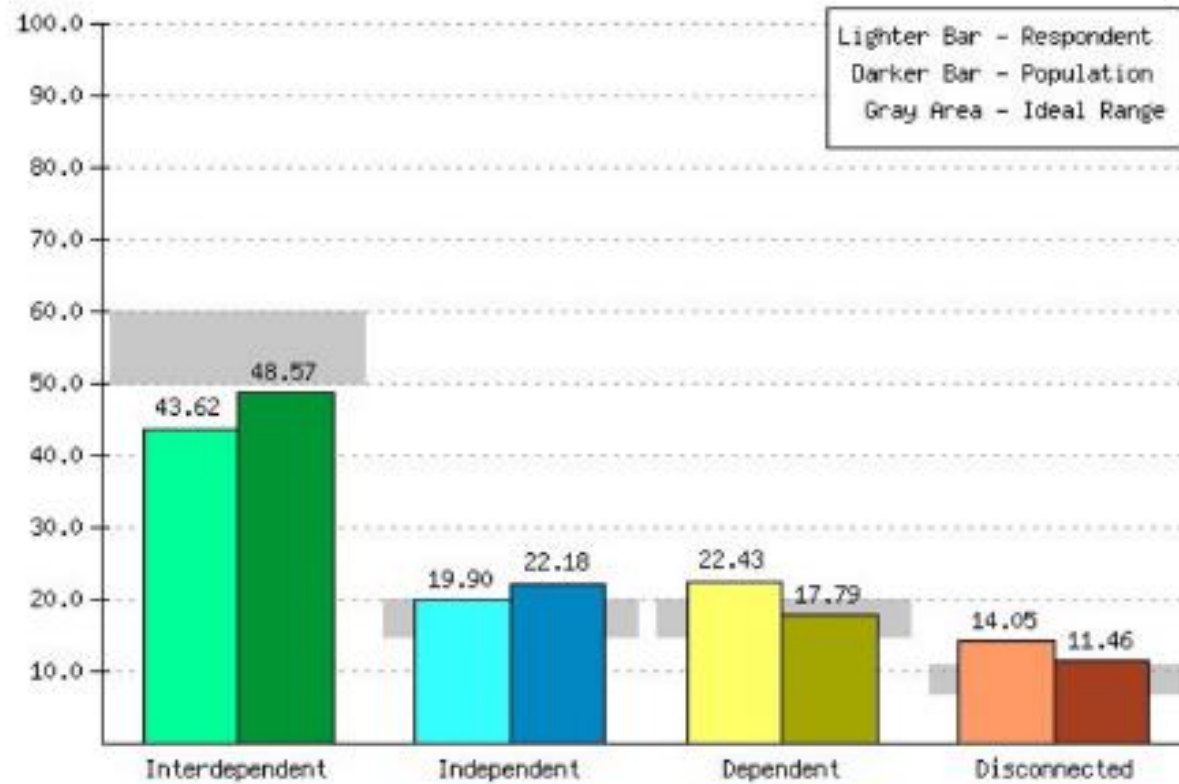
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We-I Profile, Learning in Action

EI in Relationship

Default Relationship Strategies

Self-Management Relationship Strategies



Top 10 Attributes of Great Financial Advisors

- 01. Purposeful:** They have clear mission to serve clients and help them reach their goals
- 02. Empathetic:** They know they cannot effectively serve clients with our genuinely relating to them.
- 03. Authentic:** They reveal their true selves to clients
- 04. Intellectually curious:** They continue to search for the most robust solutions for clients
- 05. Personally inquisitive:** They work hard to uncover what's truly meaningful to their clients.
- 06. Quiet:** They listen more than they talk.
- 07. Passionate:** Their unwavering desire to do well for others drives constant improvement.
- 08. Entrepreneurial:** They run their practice as a business and plan strategically for the future.
- 09. Honest:** They set realistic expectations about controllable actions and probable outcomes.
- 10. Disciplined:** They don't let market swings or media messages drive impulsive actions.



Impact Question:

Go back to the major responsibilities and goals.

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The background of the image is a close-up, circular cross-section of a tree trunk, showing concentric growth rings and a natural wood grain texture. The color is a deep, muted teal or dark blue-green.

PRACTICES
— TO —
DEVELOP EMOTIONAL
INTELLIGENCE.

Independent Practices

01. Be present with yourself and the world around you several times a day.
02. Identify your emotions often. Be specific. Get curious. Use the right language. (feelings wheel, mood meter app, *Atlas of the Heart*)
03. Reflect. Journal what you notice. Ask yourself thoughtful questions.
04. Focused attention and mindfulness. Bicep curls for EI (and all wellness)
05. Work with a skilled coach. Consider working with an EI instrument providing insights. Gather feedback.


Partner/Group Practices



01. Work together as accountability partners.
02. Talk with each other about navigating the inner weather. Practice talking about emotions with others
03. Help each other pause more often
04. Work with a skilled coach. Consider working with an EI instrument providing insights.

GETTING STARTED

What is ONE thing you will put into action based on what we've reviewed today?

- Write it down right now.
- How will you know you've done it? What does success look like?
- Who will it impact?
- By when will you start and by when will it be finished?
- When you're finished give the person next to you a thumbs up 

Liv Olson Consulting:

- CEO Advisory
- Executive Coaching
- Wealth Advisor Accelerator
- Team Effectiveness Coaching
- Offsite Design & Facilitation
- Workshop Design
- Organizational Culture



www.livolsonconsulting.com

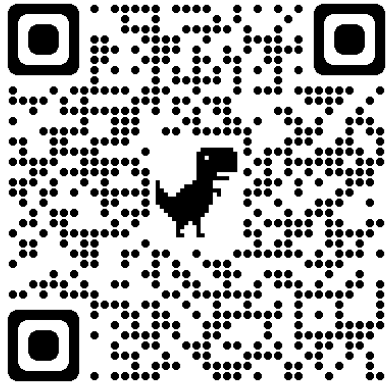


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LinkedIn

Questions & More Information



Visit my website for
more information...



Schedule a 20 min
exploration call

Sources & Citation

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3. HBR's 10 Must Reads on Emotional Intelligence.
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