

Strengthen Your Client Base by Creating Meaningful Connections



Anastasia “Stasie” Tammen

CA Notary and Seminar Instructor for the NNA



How do I connect with my clients?

- **Lean into your strengths**
- **Market what makes YOU different**
- **Assess your Client**
- **Work in Objectives**



How do I negotiate or handle conflict?

- **Consistency is key**
- **Prepare proactively**
- **Mindfulness**
- **The Power of “NO”**





What are five words you would you describe YOU?

Ambitious	Amiable	Bold
Confident	Conscientious	Creative
Decisive	Dependable	Diligent
Enthusiastic	Ethical	Extrovert
Flexible	Friendly	Honest
Imaginative	Influencing	Inspirational
Leader	Loyal	Organized
Perceptive	Personable	Reliable
Resourceful	Versatile	Visionary

Clients want to Know YOU!

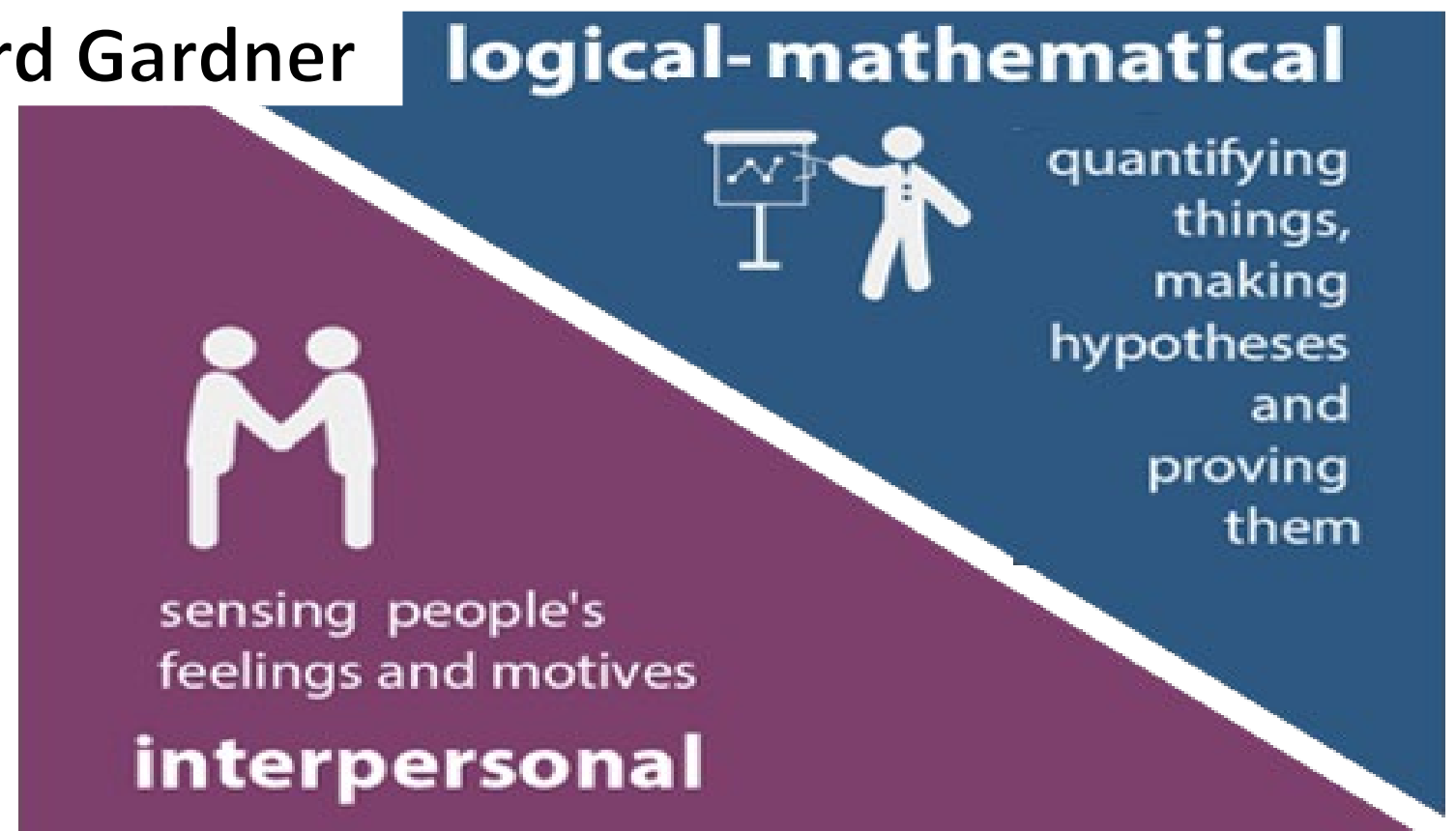
- What are you passionate about?
- How do you communicate your interests?
- What makes you different?
- How can you play to your strengths?





The Theory of Multiple Intelligences

By Howard Gardner



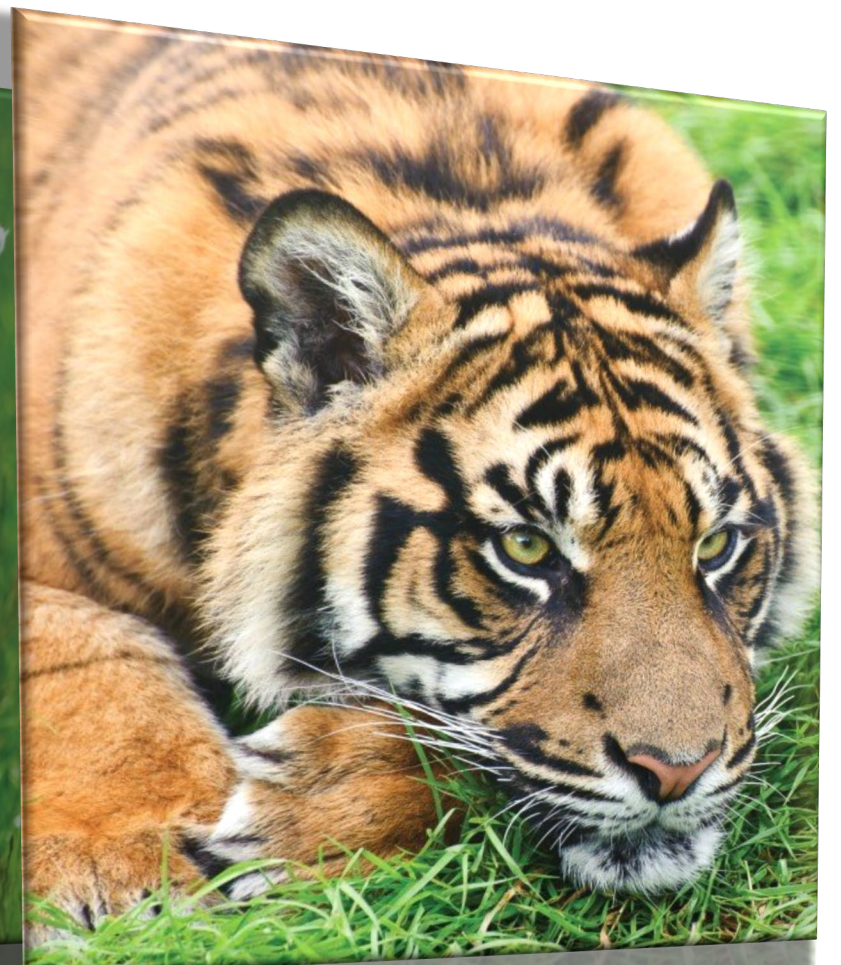


Know your AUDIENCE

- Self-presentation will naturally attract “target audiences”
 - 86% of people say authenticity matters when deciding on what brand to support
- How do we create personalized experiences for people who might differ from ourselves?

THE B.O.L.T. SYSTEM

Developed by Charles J. Clarke III



HELPS YOU QUICKLY IDENTIFY CLIENT'S PERSONALITY



- It's a “user-friendly” way to recognize how to interact with clients.
 - Especially for clients who are different from us!
- Based on cues we can categorize based on verbal and non-verbal cues

The Bull Type

Who they are

- Decisive
- Assertive
- Controlling
- No-Nonsense

What they want

- No Nonsense
- Be Direct
- The fast & factual answer



The Owl Type

Who they are

- Analytical
- Thorough
- Cautious
- Inquisitive

What they want

- Detailed answers
- Statistics & research
- Time to contemplate!



The Lamb Type

Who they are

- Mild-mannered
- People Pleasers
- Passive
- Cautious

What they want

- Patience
- Your personal take on things
- Questions





The Tiger Type

Who they are

- Expressive
- Optimistic
- Disorganized
- Spontaneous

What they want

- To get to know you
- Highlights
- Follow up



What do I need from this notarization?

- “I need money”
- “I need experience”
- “I need consistent clients”
- “I need to avoid illegal activity”

What does my client need?

“I need this document notarized”

- “I need this loan to be approved”
- “I need to win my court case”
- “I need this for my partner”

The image features two hands against a light blue background. The hand on the left is a woman's hand, giving a thumbs up gesture. The hand on the right is a man's hand, giving a thumbs down gesture. The two hands are positioned close together, with their thumbs pointing in opposite directions, creating a visual metaphor for conflict or opposing interests. Overlaid on this image is the text 'What happens when our needs conflict with our clients needs?' in a white, bold, sans-serif font with a slight drop shadow.

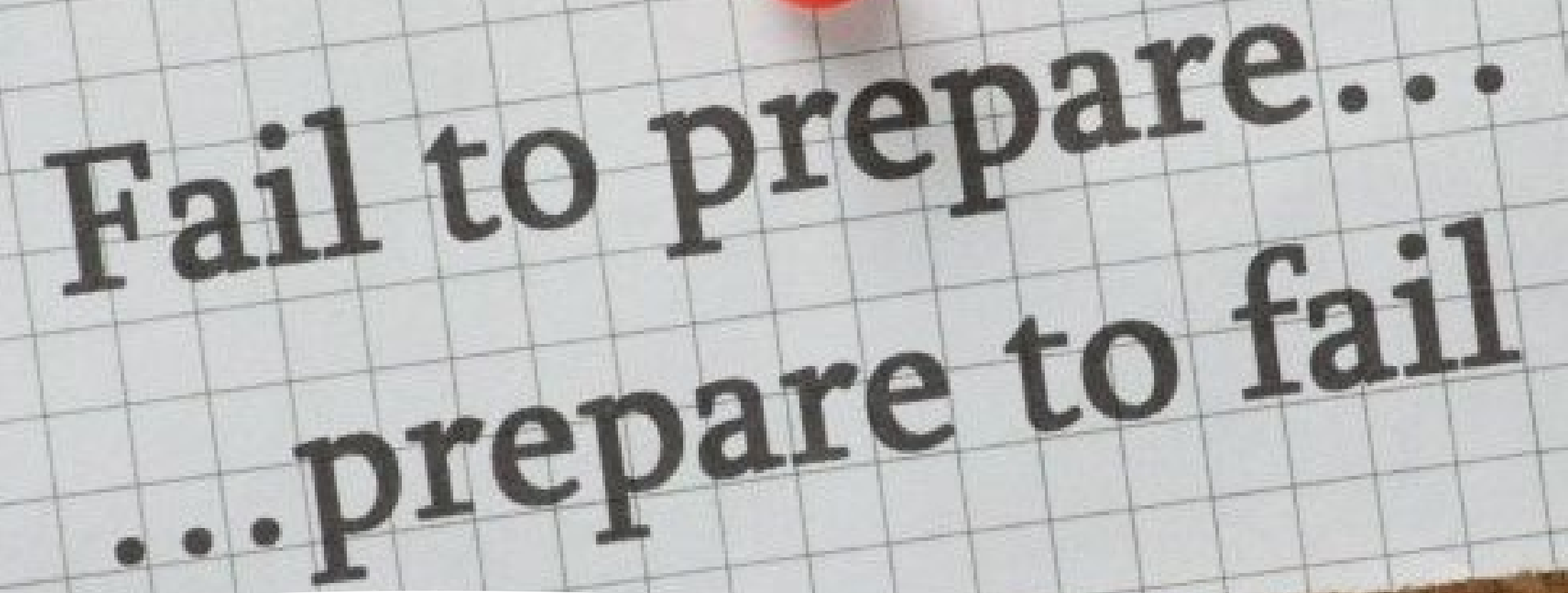
**What happens when
our needs conflict with
our clients needs?**



Negotiation Styles

Based off Thomas Kilmann's Conflict Styles





Fail to prepare...
...prepare to fail

Keys to Proactive Negotiations

- Presentation matters
- Active Listening
- Consistent Standards
- Visual Aides
- Solution-Oriented Suggestions

If Conflict Should arise....

- S** – Stop what you are doing to check in with yourself
- T** – Take a breath
- O** – Observe your thoughts, emotions & body
- P** – Proceed with something that will support you

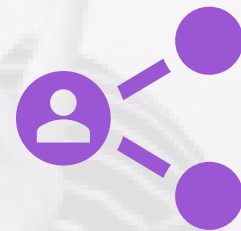




Grounding Tools for Conflict

- “5, 4, 3, 2, 1”
- Recite an affirmation or grounding phrase
- Visualize something enjoyable!
- Make yourself laugh
- Take a walk

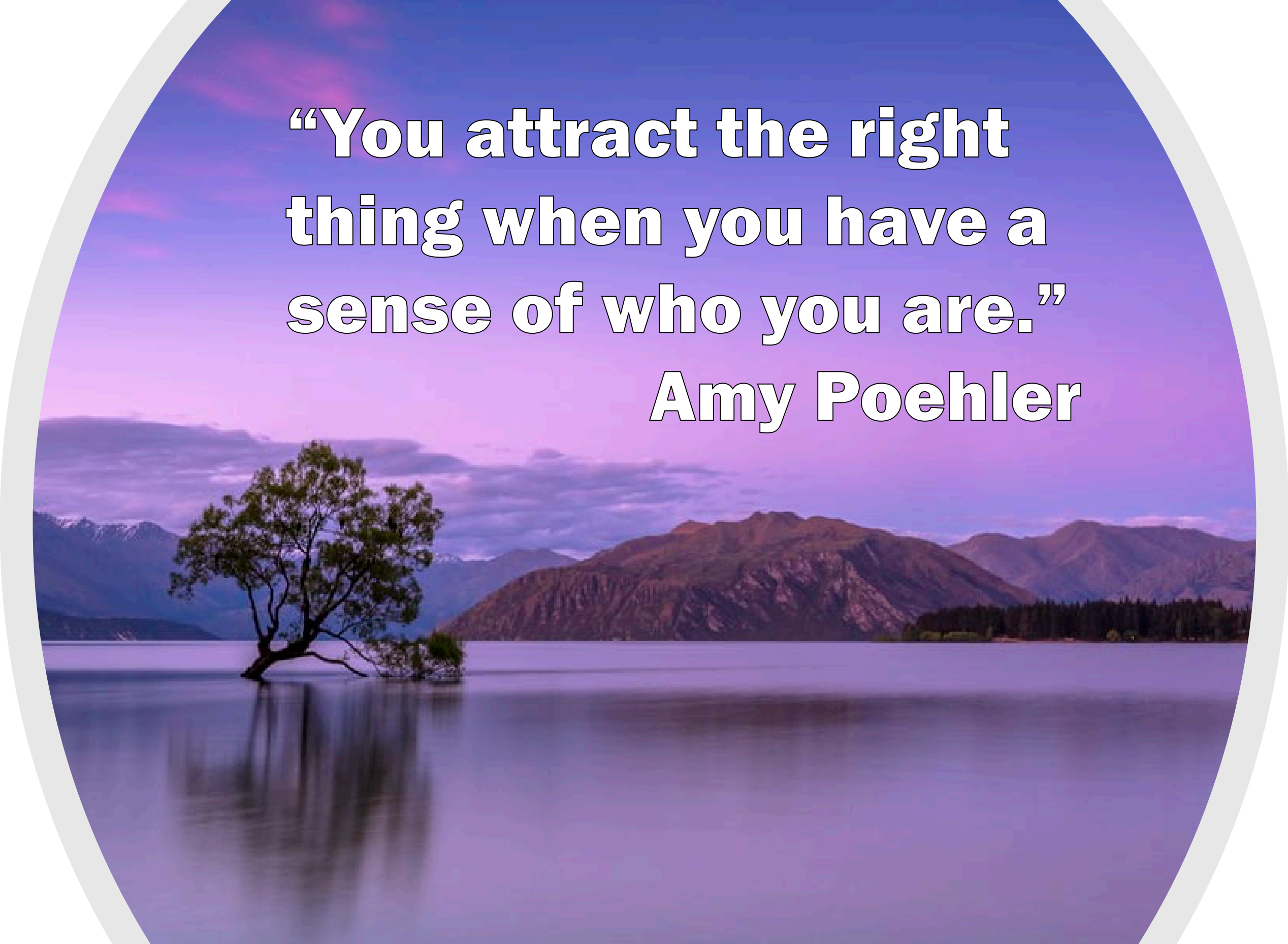
Discouraging Negative Behaviors



“This or That”



“No, thank you!”

A circular frame containing a scenic landscape. In the foreground, a calm lake reflects the sky and the surrounding landscape. A single, dark, leafy tree stands in the water on the left side. In the background, a range of mountains is visible under a sky with soft, colorful clouds in shades of purple, pink, and blue, suggesting a sunset or sunrise. The text is overlaid on the upper half of the image.

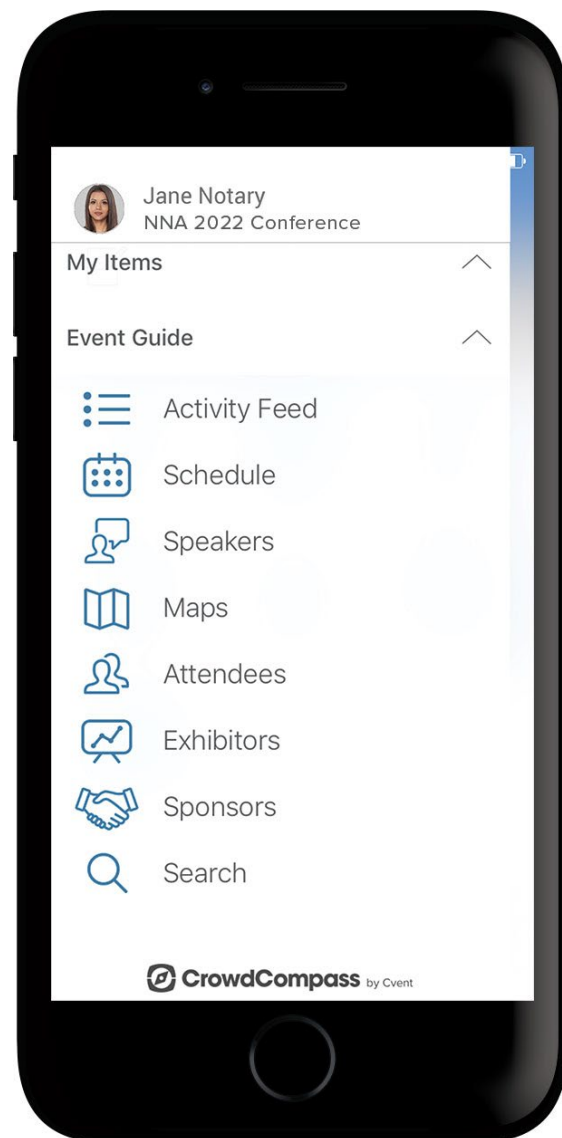
**“You attract the right
thing when you have a
sense of who you are.”**

Amy Poehler

Questions?

Presenter Contact Information

Anastasia “Stasie” Tammen
CA Notary and Seminar Instructor
atammennotary@gmail.com



Rate this workshop

Please tap the NNA 2022 App to rate this presentation. If you have questions about the app, visit us at the NNA Hub.

Thank you for attending!