

The 5 Communication Habits of Highly Effective Insurance & Financial Services Professionals

by

Jeff Heasman PGCert CELTA, LL.B (Hons), LL.M



[linkedin.com/in/jeffheasman](https://www.linkedin.com/in/jeffheasman)



@JHTCTweet



Jeff Heasman

Training & Consulting

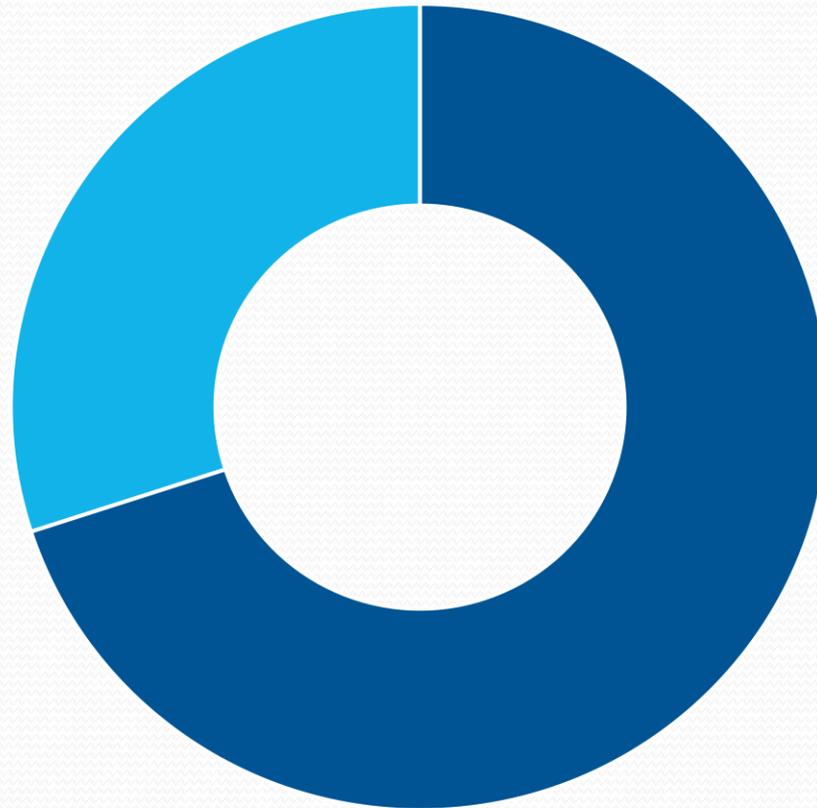
Learning objectives

By the end of the session, participants will be able to:

- identify how communication contributes to being a highly effective communicator.
- recognise the 5 main habits that insurance and financial services professionals have for communicating effectively.
- implement a strategy to communicate more effectively.



Time spent communicating



■ Communicating ■ Not communicating



The 5 Habits

Highly effective insurance and financial services professionals are able to do the following:

1. Manage emails.
2. Recognise the power of talk.
3. Identify the agenda in communication.
4. Show intellectual humility.
5. Use plain language.



The impact

- Better client satisfaction.
- Happier workplaces.
- Greater productivity.
- Fewer mistakes.
- Greater sharing of information.
- More creative and innovative ideas.



Habit 1 – managing emails

- Scheduling time to read and respond.
- Prioritising.
- Organising your inbox.
- Unsubscribing from what you don't read.



Habit 2 – recognising the power of talk

- Email should often be considered the secondary method of communication.
- We need to humanise communication.
- It should be combined with the ability to listen.
- The difference between “I think” (fact) and “you think” (guess).



Habit 3 – identifying the agenda

- Removing hidden agendas.
- Identifying the right agenda.
- Focusing on the solution and not the problem.
- Looking for a sensible outcome and not a win/lose outcome (agreement v acceptance).



Habit 4 – showing intellectual humility

- The ability to recognise that your beliefs or opinions may be incorrect.
- Questioning skills are key.
- A balance between:
 - efficiency and effectiveness.
 - open-mindedness and overly conciliatory.



Habit 5 – using plain language

- Removing the legalese goggles.
- Paraphrasing complex information.
- Accessibility as well as readability.
- Building trust and confidence.



Summary /restatement of learning objectives

During this session, we have looked at:

- The importance of communication strategies.
- The 5 main communication habits of highly effective insurance and financial services professionals.
- Strategies that can be implemented to be a highly effective professional.



Any questions?

