

# SIMILARITY & AFFINITY BIASES PLANNER

**We like people the more they are like us. We tend to prefer and trust others with similar backgrounds, points of view, goals, or agendas.**

What questions can I ask to truly understand Clients' goals, needs, and agendas?

How can I get to a deeper understanding of Clients' priorities?

Who would feel good about helping themselves or me by referring me, introducing me, or sharing their success story?

How can I use examples from my practice or 3<sup>rd</sup> party data to show Clients how strategies can work for them?

Am I at enough kitchen tables? How can I get invited to more?

Where can I include more "we" language and personalization in Client messaging?

How can I use 3<sup>rd</sup> party data, industry experts, and wholesalers to position myself as a Client advocate?

How can I connect more like-minded clients with each other?

How can I introduce newer or prospective Clients to successful Clients like them?

