

Can emotional agility help you be a better adviser?

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We've all heard of emotional intelligence, but the concept of emotional agility takes it one step further.

Mastering the four stages of emotional agility can help financial advisers support clients to embrace change, and navigate life's twists and turns with clear-sightedness and an open mind.

What is emotional agility?

Emotional agility refers to the capacity to tune into, acknowledge, and successfully navigate our inner experiences and emotions in order to thrive in life and at work.

Peta Sigley, the Co-Founder and Chief Knowledge Officer at Springfox – a provider of resilience programs for individuals and companies – emphasises that emotional agility is different from emotional intelligence.

“Where emotional intelligence refers to being aware of how you're feeling, emotional agility asks you to look at where those feelings stem from and how you can work through them to obtain the best outcome,” she says.

South African psychologist Susan David introduced the concept in her book *Emotional Agility: Get Unstuck, Embrace Change, and Thrive in Work and Life*, proposing that there's four pillars of emotional agility:

- Showing up (facing thoughts, emotions and behaviours with curiosity and kindness).
- Stepping out (detaching from thoughts and behaviours).
- Walking your why (using core values to move in the right direction).
- Moving on (finding the balance between challenge and competence).

The benefits of emotional agility at work

Individuals who have high emotional agility are usually empathic, adaptable, self-aware and optimistic. Within workplaces emotional agility can lead to high levels of achievement, innovation and leadership.

“Emotional agility enables us to respond better to change and new developments – something that's inevitable in the finance sector,” Sigley says.

“For financial advisers, a lack of emotional agility can quickly compromise relationships with clients and decision making at work.”

Yet, those who're able to navigate their own emotions and those of their clients, are well placed to

demonstrate empathy, understanding and optimism, and build trust with their clients.

4 steps to building emotional agility for financial advisers

1. Identify specific emotions to build your emotional vocabulary

Emotions are the signals we feel in response to what's happening around us.

“Emotional agility requires us to look further and understand, for example, whether anger is actually frustration, disappointment or jealousy,” says Sigley.

2. Identify and understand the emotions of others

Recognising and understanding the feelings of others enables advisers to develop and strengthen relationships.

“Be careful not to be too quick to pre-empt the needs of others,” advises Sigley.

3. Choose responses based on purpose and values rather than feelings

“Practise navigating your negative emotions in a way that allows you to recognise and acknowledge how you feel, before setting the emotion aside,” says Sigley.

4. Acknowledge your positive emotions and build on them

“Look at ways to build authentic positive emotion in both clients and colleagues,” says Sigley. “Not just through dollar signs, but through establishing meaningful relationships based on mutual trust.”

While emotional agility is perceived as a ‘soft skill’, Sigley says it’s impossible to overstate its importance.

“It can extend through all levels of a business, boosting organisational culture and wellbeing with flow-on effects.”

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