

Module 6: Building Rapport & Trust

Training Guide for One-on-One Session

Duration: 30 minutes

Week: 6

Phase: Skill Development (Weeks 5-8)

Session Overview

People buy from people they like and trust. No matter how good your product or how compelling your presentation, prospects won't move forward if they don't feel comfortable with you. Building rapport and establishing trust are foundational skills that accelerate every stage of the sales process.

This module teaches practical techniques for quickly building authentic connections with prospects, establishing credibility, and creating the trust necessary for long-term client relationships. Unlike manipulative "rapport tricks," these approaches are genuine and sustainable.

Learning Objectives

By the end of this session, the salesperson will be able to:

1. **Understand the psychology of trust** and why it's critical in financial services
2. **Build rapport quickly** using proven techniques that feel natural and authentic
3. **Establish credibility** through social proof, expertise demonstration, and professional presence
4. **Adapt communication style** to match different personality types (DISC framework)

5. **Maintain trust** through consistent follow-through and transparent communication
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The Psychology of Trust

Trust is the foundation of all business relationships, especially in financial services where prospects are making significant decisions that involve risk. Understanding how trust is built and maintained allows you to accelerate the process authentically.

The Trust Equation:

$$\text{Trust} = (\text{Credibility} + \text{Reliability} + \text{Intimacy}) \div \text{Self-Orientation}$$

Credibility: Do they believe you know what you’re talking about?

Reliability: Do they believe you’ll do what you say?

Intimacy: Do they feel comfortable being open and vulnerable with you?

Self-Orientation: Do they believe you care about their interests or just your own?

When any of the top three factors increase, trust increases. When self-orientation increases (you seem too focused on your own agenda), trust decreases.

Why Trust Matters in Private Lending:

Real estate investors are making significant financial decisions. They’re trusting you with deals that could make or break their business. They need to believe that:

- You understand their business and challenges
- You’ll deliver what you promise (rates, timelines, terms)
- You’re looking out for their best interests, not just closing a deal
- You’ll be responsive when problems arise

Without trust, even the best loan terms won’t close the deal. With trust, prospects will choose you even when competitors offer slightly better rates.

Building Rapport: The Foundation

Rapport is the feeling of connection and mutual understanding between two people. It's the foundation upon which trust is built. While rapport can develop naturally over time, skilled salespeople know how to accelerate the process authentically.

The Mirroring Technique

People naturally feel more comfortable with others who are similar to them. Subtle mirroring of communication style, pace, and energy creates subconscious comfort.

What to Mirror:

Pace of Speech: If they talk quickly, speed up slightly. If they're slower and more deliberate, slow down.

Energy Level: Match their enthusiasm level. Don't be overly energetic with someone who's calm and measured.

Formality: If they're casual and use first names immediately, match that. If they're more formal, maintain professionalism.

Communication Style: If they're direct and to-the-point, don't ramble. If they're relationship-focused and chatty, don't rush them.

Important: Mirroring should be subtle and natural, not mimicry. You're adjusting your style to make them comfortable, not copying their every move.

Finding Common Ground

Shared experiences, interests, or backgrounds create instant connection. The key is to discover these commonalities naturally through conversation.

Effective Approaches:

Geographic Connection: "I noticed you're in [city]. I grew up near there / I love that area / I've worked with several investors there."

Industry Experience: "I've been working with real estate investors for X years, so I understand the challenges you're facing."

Shared Challenges: “A lot of my clients were frustrated with the same thing before they found us.”

Mutual Contacts: “I work with [name] who’s also in the [area] market. Do you know them?”

Avoid: Forced or fake commonalities. If you don’t genuinely share something, don’t pretend you do. Authenticity matters more than having things in common.

Active Listening as Rapport-Building

One of the fastest ways to build rapport is to genuinely listen and show interest in what prospects are saying. People feel valued when someone truly hears them.

Techniques:

Reflect Back: “So what I’m hearing is...” This shows you’re listening and confirms understanding.

Ask Follow-Up Questions: Going deeper into their answers demonstrates genuine interest.

Remember Details: Reference something they mentioned earlier in the conversation. “You mentioned earlier that...”

Validate Their Experience: “That must have been frustrating” or “I can see why that would be important to you.”

Establishing Credibility

Rapport makes people like you. Credibility makes them trust your expertise. Both are necessary for closing deals in financial services.

Demonstrating Expertise

You don’t need to be the smartest person in the room, but you do need to demonstrate that you understand their business and can solve their problems.

Effective Approaches:

Ask Insightful Questions: The quality of your questions demonstrates expertise. “How are you currently structuring your deals to maximize cash-on-cash return?”

Share Relevant Experience: “I’ve worked with several investors doing exactly what you’re describing. One challenge they often face is...”

Provide Market Insights: “We’re seeing a lot of activity in that market right now. Cap rates have compressed about 50 basis points in the last six months.”

Anticipate Needs: “Based on your growth plans, you’ll probably want to look at our line of credit option in addition to individual deal financing.”

Avoid: Name-dropping, jargon overload, or trying to prove you’re smarter than them. Expertise should feel helpful, not intimidating.

Leveraging Social Proof

People trust what others like them have already validated. Social proof reduces perceived risk and builds confidence in your solution.

Types of Social Proof:

Case Studies: “We recently helped an investor in your area who was facing the same challenge. They were losing deals to cash buyers, and we helped them close 8 properties in 6 months with our 24-hour approval process.”

Testimonials: Share specific quotes from satisfied clients (with permission).

Statistics: “We’ve funded over \$X million for investors in [area]” or “Our average client closes X deals per year.”

Mutual Connections: “I work with [name] who you might know. They’ve been using our DSCR loans for their portfolio.”

Industry Recognition: Awards, certifications, or media mentions (if relevant and not boastful).

Best Practice: Use social proof that’s relevant to the prospect’s specific situation. A case study about someone in their market doing what they want to do is more powerful than generic success stories.

Professional Presence

Your professionalism signals competence and reliability. Small details matter, especially in financial services.

Elements of Professional Presence:

Responsiveness: Return calls and emails quickly. Even if you don't have an answer, acknowledge receipt and set expectations.

Preparation: Know who you're talking to before calls. Reference their business or previous conversations.

Organization: Have information readily available. Don't fumble around looking for documents or details.

Clear Communication: Explain complex concepts simply. Avoid jargon unless they use it first.

Follow-Through: Do what you say you'll do, when you say you'll do it. This is the fastest way to build trust.

Adapting to Communication Styles (DISC)

Different personality types build rapport and trust differently. Adapting your approach to match their style accelerates connection and reduces friction.

D - Dominant/Direct

Characteristics: Results-focused, direct, decisive, impatient with details

How to Build Rapport:

- Get to the point quickly
- Focus on results and ROI
- Be confident and direct
- Don't waste their time with small talk
- Give them options and let them decide

Example Opening: “I know you’re busy, so I’ll be direct. Based on what you shared, I think our DSCR program could help you close deals 50% faster. Want me to walk you through how it works?”

I - Influential/Interactive

Characteristics: Enthusiastic, social, relationship-focused, optimistic

How to Build Rapport:

- Be warm and enthusiastic
- Share stories and examples
- Build personal connection before business
- Use testimonials and social proof
- Make it fun and engaging

Example Opening: “It’s great to connect! I love working with investors like you who are really growing their portfolios. Tell me about your journey into real estate investing.”

S - Steady/Supportive

Characteristics: Patient, reliable, risk-averse, values relationships and stability

How to Build Rapport:

- Be patient and don’t rush them
- Provide reassurance and reduce risk
- Build trust slowly and consistently
- Show you’re reliable and consistent
- Emphasize support and partnership

Example Opening: “I appreciate you taking the time to talk. I want to make sure I understand your situation fully so I can provide the best guidance. There’s no pressure - let’s just explore whether this makes sense for you.”

C - Conscientious/Careful

Characteristics: Analytical, detail-oriented, precise, values accuracy and data

How to Build Rapport:

- Provide detailed information and data
- Be accurate and precise
- Give them time to analyze and decide
- Answer questions thoroughly
- Don't push for quick decisions

Example Opening: “I’ve prepared some detailed information about our program based on your situation. I’ll walk you through the specifics, and please ask any questions you have. I want to make sure you have all the information you need to make the best decision.”

Maintaining Trust Through the Sales Process

Building initial trust is important, but maintaining it throughout the relationship is what creates long-term clients and referrals.

Transparent Communication

Honesty and transparency build trust faster than anything else. When prospects sense you’re hiding something or being evasive, trust erodes quickly.

Best Practices:

Be Upfront About Limitations: “Our program is great for X, but if you need Y, I’d recommend [alternative].”

Set Realistic Expectations: Don’t overpromise to close the deal. Under-promise and over-deliver.

Admit When You Don’t Know: “That’s a great question. I want to give you accurate information, so let me confirm that with our underwriting team and get back to you today.”

Disclose Potential Issues Early: If there's something that might be a problem, address it proactively rather than hoping they don't notice.

Consistent Follow-Through

Trust is built through consistent actions over time. Every time you do what you say you'll do, trust increases. Every time you don't, it decreases.

The Follow-Through System:

Set Clear Expectations: "I'll get you that information by end of day tomorrow."

Track Commitments: Use a CRM or task system to ensure nothing falls through the cracks.

Deliver Early: If you said end of day tomorrow, deliver by noon tomorrow.

Communicate Proactively: If something changes, let them know immediately rather than waiting for them to follow up.

Close the Loop: After delivering what you promised, confirm they received it and ask if they have questions.

Handling Problems with Integrity

Problems will arise. How you handle them determines whether trust is maintained or destroyed.

The Problem-Handling Framework:

Acknowledge Quickly: Don't hide from problems. Address them immediately.

Take Responsibility: Even if it's not entirely your fault, own the client experience.

Provide Solutions: Don't just explain the problem - offer options for resolution.

Follow Up: After resolving the issue, check in to ensure they're satisfied.

Example: "I apologize - there's been a delay in underwriting that will push our timeline back by 2 days. I know that's frustrating. Here's what I'm doing to expedite it, and I'll keep you updated every step of the way. Is there anything on your end that this impacts that I should be aware of?"

Rapport-Building Mistakes to Avoid

Even well-intentioned rapport-building can backfire if done incorrectly. Avoid these common mistakes:

Mistake #1: Fake Rapport

Forced enthusiasm or fake interest is obvious and damages trust. Be genuinely interested or don't pretend.

Mistake #2: Oversharing

Building rapport doesn't mean sharing your life story. Keep the focus on them and their needs.

Mistake #3: Inappropriate Humor

Humor can build rapport, but inappropriate jokes (politics, religion, controversial topics) can destroy it instantly.

Mistake #4: Talking Too Much

Rapport is built through connection, not monologues. Listen more than you talk.

Mistake #5: Being Too Familiar Too Fast

Match their level of formality. Don't assume first-name basis or casual language until they initiate it.

Mistake #6: Neglecting Follow-Up

Rapport built in one conversation disappears quickly if you don't maintain contact.

The First Impression Framework

You never get a second chance to make a first impression. The first 30 seconds of any interaction set the tone for the entire relationship.

The 30-Second First Impression:

1-5 Seconds: Visual Impact

- Professional appearance (appropriate for your industry)

- Confident body language
- Genuine smile
- Eye contact

6-15 Seconds: Verbal Introduction

- Clear, confident voice
- Warm greeting
- Professional introduction
- Set positive tone

16-30 Seconds: Establish Connection

- Show genuine interest
- Ask an engaging question
- Make them feel valued
- Set agenda for conversation

Example First Impression:

[Confident, warm tone] “Hi [Name], thanks so much for taking the time to talk today. I’m looking forward to learning about your real estate investing business and seeing if there’s a way we can help you achieve your goals. Before we dive in, how’s your day going so far?”

This opening is:

- Professional but warm
 - Focused on them, not you
 - Sets clear expectations
 - Invites engagement
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Session Delivery Guide

Opening (5 minutes):

- Review Module 5 discovery call practice results
- Discuss current approach to building rapport and trust
- Set expectations for developing authentic connection skills

Core Teaching (20 minutes):

- Explain the psychology of trust and why it matters (5 minutes)
- Demonstrate rapport-building techniques with examples (7 minutes)
- Walk through credibility establishment strategies (5 minutes)
- Practice adapting to different DISC styles (3 minutes)

Action Planning (5 minutes):

- Review Action Worksheet
 - Role-play rapport-building scenarios
 - Identify their natural strengths and growth areas
 - Answer questions
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Key Takeaways

1. **Trust is the foundation** of all sales relationships, especially in financial services where significant decisions are being made.
2. **Rapport accelerates trust** through mirroring, finding common ground, and active listening - all done authentically.
3. **Credibility is established** through demonstrating expertise, leveraging social proof, and maintaining professional presence.
4. **Adapt your approach** to different personality types (DISC) to build rapport more quickly and effectively.
5. **Maintain trust** through transparent communication, consistent follow-through, and handling problems with integrity.
6. **First impressions matter** - the first 30 seconds set the tone for the entire relationship.

Preparation Checklist

Before delivering this session:

- Review the salesperson's natural communication style
 - Identify their DISC personality type
 - Prepare to role-play different personality type scenarios
 - Have case studies and testimonials ready to demonstrate social proof
 - Review their Action Worksheet assignments
 - Prepare feedback on their rapport-building approach from previous calls
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This training guide is designed for a 30-minute one-on-one session. Adjust depth and examples based on the salesperson's experience and specific challenges.