

How to Tangibly Improve Your Advisor Skills

Type: Newsletter Subject: Client Advisor Skills

By Andrew Sobel

While in his 80s, the great classical guitar maestro Andrés Segovia was asked by a journalist if, at this late stage of his career--and given his greatness as a guitarist--he still practiced scales. "Two hours a day" was Segovia's reply.

Deliberate Practice is what leads to a significant improvement in personal capabilities. Deliberate Practice is when you isolate those elements of your performance that contribute to successful outcomes; practice them repeatedly; and get objective feedback from an experienced observer. The deliberate practice approach is most obvious in musical training, as dramatically reinforced by Segovia: a classical guitarist practices scales because scales are the foundations of actual compositions (melodies are, in a sense, pieces of scales joined together in a whole). The student not only practices them repeatedly to achieve mastery, but needs to get critiqued by an unbiased instructor (receiving objective feedback) so that he understands how to improve. The problem with business professionals is that they do their jobs each day but usually don't isolate the elements that support great performance and rehearse them. The result is marginal improvement over time, or worse, the continuation of bad habits which are erroneously associated with success! (My friend and CEO coach Marshall Goldsmith calls these "executive superstitions"!).

Another aspect of Deliberate Practice is planning for and awareness of your work while you are executing it. For example, let's say you have a client meeting coming up. Do you carefully plan for that conversation, and set small goals for what you'd like to achieve and how you'd like to conduct it? During the meeting, are you observing what's going on and adjusting your behavior to adapt to changing conditions? After the meeting, do you do an "after action review" and carefully analyze what went well and what you could have done better?

Here are just a few examples of *Deliberate Practice* that would help you develop your trusted advisor skills. Remember, a hallmark of Deliberate Practice is that it is difficult. It requires time, concentration, and focus; and it can be tedious. But it is the key to performance improvement.

1. Client conversations: For every client meeting, write down a list of half a dozen questions that you could ask your client.

- Now, challenge your own list: Are your questions truly thought provoking? Could you gain that information elsewhere? Will they be the same questions everyone else has asked the client, or will they be refreshing and different? Could you word them more effectively? Do they implicitly demonstrate your industry and client knowledge? Are there better questions you could ask? How do you think your client will respond?
- Next, refine the list and boil it down to just three excellent questions.
- Finally, practice asking each one out loud four or five times, or until you have memorized them and they "roll off your tongue" in a natural and relaxed manner

2. More client conversations: Write down the 5-10 most common questions you get asked by clients about you, your work, your firm, your approach, and so on.

- Draft a short (50 word) and long (150 word) answer to each one. Practice saying them out loud. Then revise your drafts. Then rehearse with a friend or colleague to get additional feedback on the effectiveness and persuasiveness of your responses. Redraft them and practice them until you have memorized them and reciting them is second nature.

3. Proposal pitches: The next time you present a client proposal to a prospect or a set of recommendations to a current

client, prepare for the event so that your communications are as clear, persuasive, and resonant as possibleâ€”rather than simply preparing your notes and "winging" it. For example:

- Read examples of famous, persuasive speeches (e.g., Martin Luther King Jr., "I Have a Dream"; Winston Churchill, "We Shall Fight them on the Beaches" or "Blood Sweat and Tears"; John F. Kennedy, "Man on the Moon", etc.). Ask yourself what you find effective about each one.
- Work to incorporate engaging, rhetorical devices in your presentation, e.g.: examples, stories, personal turning points, analogy, metaphor, statistics, market research, and so on. Draft and redraft the opening five minutes and closing five minutes.
- Rehearse your presentation in front of a friend or colleague, and get their feedback. Revise it, and rehearse it again.

4. Deepening your core network: Begin setting aside one to two hours a week, on a regular basis, to focus on the long term relationships you should be building to support your career. Devote this time to 3 specific activities:

- **Prioritizing:** Review your list of key relationships (15-25) and assess which ones you should focus on now (this week, this month). Also think about names that ought to be on the list which are not.
- **Learning:** The key to adding value in a relationship is to understand the other person's agenda of key issues and needs (business and personal). In what way can you help each person on your list?
- **Acting:** Use this time to call or otherwise communicate with people on your list, to check in with them, set up a meeting, avert them about something you are sending to them, etc.

5. Increasing your breadth: Regularly and systematically build your "Deep Generalist" capabilities, which help you see the big picture for clients and engage them in broad-based business conversations.

- First, take an inventory of everything you read on a regular or occasional basis. Assess how effectively this supports deepening and honing your Deep Generalist skills, in 4 areas: Your core specialty, the industry and/or function your clients tend to work in, the general business environment, and also areas of personal interest that lie outside of work. Where do you need to read more and be more active? Make a plan to add publications where necessary.
- Count how many non-fiction books you read last year (business books, biographies, histories, etc). Set a goal for the next 12 months. It should be at least 12. Each time you read (or skim!) a book, write down the 5 or 6 key messages. Make sure some of the 12 (or 20) are in areas outside your normal bailiwick.
- Pick one or two topics you are going to develop new or extended expertise around in the next year. Make an action plan of books and articles to read, conferences to go to, and so on.

6. Adding value for time: Increase your repertoire of illuminating client example, trends, best practices so that you can rapidly and facilely add value in executive conversations.

- Write up five client case examples that are 50-75 words in length (no more!). Address: The client's situation or problem; the solution that you/your firm developed to address it; and the outcome or value delivered. Memorize these examples until you can smoothly recite them as you would a story about a trip to Rome with an elderly great uncle or a funny incident at work. Learn to tell them with confidence and without using any filler words like "uh" and "you know."
- Develop 3 industry or functional "points of view" that you can share with clients. These should also be very briefâ€”no more than 75-100 words. They should start out "What we're seeing is?" and describe a trend, pattern or observation. Again, memorize these and learn to tell them with confidence and without using any filler words.

Just working harder or longer doesn't mean you're getting better. Use these types of Deliberate Practice activities to really

improve your trusted advisor capabilities.

Andrew Sobel is the leading authority on client relationships and the skills and strategies required to earn enduring client loyalty. The most widely published author in the world on business relationships, he is a consultant, educator, and coach to major services firms worldwide. Andrew is the author of the recently released *All for One: 10 Strategies for Building Trusted Client Partnerships* which was voted one of the top 10 professional services sales and marketing books of the decade as well as the business bestseller *Clients for Life* and *Making Rain*. He has contributed chapters to four books on leadership, marketing, and human resources management; and his articles and work have appeared in publications such as the *New York Times*, *US Today*, *Strategy+Business*, and the *Harvard Business Review*. He was a Senior Vice President and Country Managing Director for Gemini Consulting, where he served on the European Executive Committee, and for the last 15 years he has led his own consulting firm, Andrew Sobel Advisors, Inc. He can be reached at www.andrewsobel.com (Tel: 505.982.0211).