

Ask Questions Like a Client Advisor

By Andrew Sobel

We often hear pronouncements about “the importance of asking great questions,” although we don’t actually hear very often about what those questions might be. I believe good questions can have one or more of several characteristics. They:

- o Make your client stop and think
- o Compel your client to reframe how he or she views the problem
- o Give you credibility
- o Are open-ended
- o Inherently demonstrate your expertise
- o Haven’t been asked by others
- o Move the conversation towards the client’s most important issues and concerns
- o Enable you to get to know clients as people

Good questions are also brief and succinct. A few years ago I discovered, to my dismay, just how verbose my questions were when I watched some videotaped interviews I had conducted. I would ask the client a question, then explain the question some more, then elaborate on what I really meant, and so on. Five minutes later I would finally pause to let them answer! One technique of documentary filmmakers is to always ask short, sometimes purposefully vague questions of their subjects. This leaves room for the greatest range of responses, and allows the other person to gravitate towards the most important aspects of the subject at hand.

I often talk about the “expert” versus the “advisor” mindset, and depending on which of these you have adopted, you will ask questions in very different ways. Let me give you a series of examples.

Professionals in the “expert mindset” ask questions or make statements such as:

“We planned to cover three items with you this morning”

“I’d like to tell you a little bit about my firm”

“When do you want to make a decision on hiring someone for this project?”

“What keeps you up at night?”

“What are your most important issues?”

“What would it take to win your business?”

Professionals in the “advisor mindset” ask questions or make statements such as:

“What’s the most valuable way for us to spend this time together?”

“What’s the most important issue you’d like to discuss right now?”

“What would you like to know about our firm?”

“In talking to my clients in your industry, I’m struck by a couple of particular issues they are grappling with. These include changing consumer tastes, new competition from Asia, and the growth in the power of NGOs. How would these resonate with you and your management?”

“How is your organization reacting to...(the new FASB regulation, European tariffs, the merger of X and Y, etc., etc.)”

“When it’s appropriate and the timing is right, I like to introduce you to Bill Smith. We worked with Bill and his organization as they went through many of the same changes you face, and I think you’d find a conversation with Bill very helpful.”

You see the differences—when you have the advisor mindset, you give more control to the client, you ask open-ended questions, and you try to phrase questions in a way that allows the client room to actually think and reflect.

Experts and advisors also build credibility in very different ways.

Experts like to:

Show tables or charts that illustrate how they are the biggest, the best, the most global (i.e., “league tables” for bankers)

- Bring lots of paper to meetings
- Ask informational, closed-ended questions like “What is your market share in the northeast?”
- Talk about their solutions and products
- Talk about methodology and features
- Bring many colleagues to meetings (is there safety in numbers?)
- Hold back on giving a potential client too much “valuable” information early on, since he may just take that knowledge and then not hire you

Advisors like to:

- Give examples of client assignments rather than show league tables
- Have a good, two-way conversation, perhaps bringing documents as leave-behinds
- Ask open-ended questions and occasionally challenge the client (“Are you sure you need to re-organize right now? The problem may have more to do with ill-defined roles than actual organization structure”)
- Talk about benefits and results rather than methodologies Feel comfortable holding one-on-one meetings, perhaps bringing one or two colleagues to the second meeting
- Give lots of value early on as a way of building credibility and trust—and to role model what a relationship will feel like.

For your next client meeting—or meeting, period—think about how to make the other person a true participant in the conversation. In addition to some important information you may want to convey, reflect on the 4-5 good questions you want to ask.

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