

How Well Do You *Really* Know Your Clients?

By Andrew Sobel

As a Person

- ✓ Spouse or partner, children
- ✓ Parents' vocations and interests, siblings.
- ✓ Educational background
- ✓ Formative life experiences
- ✓ Where he/she grew up
- ✓ Avocations — hobbies, interests
- ✓ Personal issues he/she may be grappling with
- ✓ Non-profit or charitable involvement
- ✓ Personal style: introvert vs. extrovert, detail oriented vs. focused on big picture, etc.
- ✓ Risk tolerance
- ✓ “Favorites”: favorite restaurant, movie, vacation spot, etc.

As a Professional

- ✓ Preferred means of communication (e-mail, phone, etc.)
- ✓ Work style (early/late, weekends, etc.)
- ✓ Name of personal assistant
- ✓ Strengths and weaknesses as an executive
- ✓ Role models, mentors
- ✓ Career history: positions held, major accomplishments
- ✓ Career goals and aspirations
- ✓ Most concerning issues right now
- ✓ Quality/tenor of relationship with his/her boss
- ✓ Relationships with key direct reports (do you know them?)
- ✓ Professional associations
- ✓ Alumni associations
- ✓ Conference participation
- ✓ Corporate Directorships
- ✓ Other top executives he/she associates with
- ✓ His/her most important “network hubs”