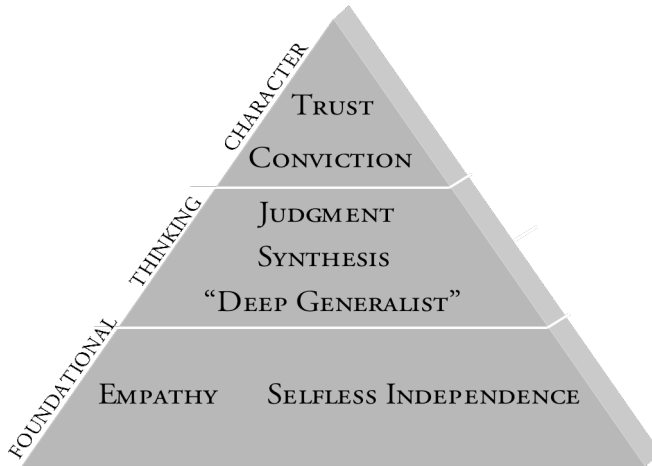


Develop Your Clients for Life



The Attributes of Client Advisors



Clients hire *experts*, but they keep *advisors*. This is the dilemma for many professionals: Expertise is the foundation of your ability to market yourself and your firm, yet the expert mindset is the biggest single barrier to developing enduring, trusted-advisor client relationships. As the great Zen teacher Suzuki wrote, “ In the beginners mind, there are many possibilities; in the expert’s, there are few.” The distinctions between the expert for hire and the client advisor are profound:

- Experts tell; advisors ask great questions and listen.
 - Experts seek to please their clients; advisors exercise selfless independence.
 - Experts are specialists; advisors are deep generalists who have depth *and* breadth.
 - Experts make judgments based on the facts; advisors incorporate their and their clients’ value systems in arriving at the right decision.
 - Experts analyze; advisors analyze *and* synthesize.
- Experts have conviction based on the accuracy of their data; advisors have deep-seated conviction based on personal values and a sense of mission.
 - Experts have professional credibility; advisors build deep personal trust.

When it comes to managing the various stages of client development, there are also significant differences between the mindset of the expert for hire and the client advisor:

1. *Affiliate and Sustain*: Experts network; advisors build long-term relationship capital with a *variety* of key figures, and they systematically sustain these contacts over many years.
2. *Break Through*: Experts do a professional job; advisors go beyond “ good work,” adding core value, surprise value, and personal value to break through with clients in multiple ways.
3. *Grow*: Experts move quickly on to the next interesting assignment; advisors invest in their key relationships, and they use a variety of strategies to mobilize their company’s resources and grow their relationships over time.
4. *Multiply*: Experts take long-standing relationships for granted; advisors treat old clients like *brand new* ones. They obtain referrals and references from their best clients, and partner with them in innovative ways.