

Create an *All for One, One for All* Organization that systematically builds Trusted Client Partnerships



Trusted Client Partnerships are the lifeblood of most firms. Building these enduring, institutional relationships requires skilled individuals *and* an organization that supports them. Based on five years of intensive research—including a study of 50 major trusted client partnerships—*All for One* sets out 10 key strategies to develop and sustain your flagship client relationships. Andrew usually tailors a speech or workshop around four or five of these strategies to meet a client’s particular needs and interests.

Strategy 1: From Agenda Reacting to Agenda Setting. When you react to the client’s agenda, you wait for the order. When you become an Agenda Setter, you invest to develop a deep understanding of their business, and you proactively engage them in value-added conversations about their most essential priorities and goals.

Strategy 2: From networking to building relationship capital. Networking is about the *many*—about adding hundreds of new people to your contact list. Building relationship capital means focusing on the critical few—the 15 or 20 key relationships that can truly make a difference—and nurturing these.

Strategy 3: From selling to executive engagement. Selling means following a five-step process, handling objections, and trying to close. Executive engagement is about engaging a senior decision maker in a thoughtful dialogue about his or her critical issues, and building trust in your capacity to address them.

Strategy 4: From individual to institutional relationships. Trusted partnerships are built on multiple trusted advisor relationships—what I call many-to-many relationships—and they require the relationship manager to be a door-opener—not a gate-keeper.

Strategy 5: From core value to multiple layers of value. You must deliver what you promise. But in trusted client partnerships, the advisor does more: He or she adds institutional value and personal value; tangible value and intangible value; expected value and surprise value.

Strategy 6: From opportunism to strategic client targeting. High-impact client relationships develop when you are working with the right client, the right executive, and the right issue. Saying no becomes as important as saying yes.

Strategy 7: From ad-hoc professional development to a client leadership pipeline. You cannot hire young professionals and hope that someday they will magically become capable of managing CEO relationships! The best organizations invest in a systematic development pipeline to develop and support their client-facing professionals.

Strategy 8: From individual silos to collaborative effort. A collaborative, one for all and all for one culture is the foundation on which you build trusted client partnerships. Individual, disconnected experts who work in silos cannot do it. There are three major enablers of firmwide collaboration.

Strategy 9: From market research to multi-level client listening. Firms that consistently build these large, institutional relationships use five different channels to tune into their clients—informal, ad-hoc feedback is insufficient. These include an independent review process, CEO to CEO meetings, and client forums to gain a 360 degree view of their key relationships.

Strategy 10: From consistent delivery to a unique client experience. In the future, the ability to add more value during client interactions while increasing “ease of use” will be essential. Leading services firms accomplish this, for example, by increasing transparency, augmenting dialogue, allowing clients to define their desired relationship experience, and changing the physical relationship experience environment.