

DEVELOPING YOUR CLIENTS FOR LIFE  
*Andrew Sobel: Sample Workshop Outline*

[Note: Every workshop program is customized to meet each client's particular needs. This sample outline is illustrative of just a few of the topics that Andrew addresses]

- 8:30            Introduction
- Market trends affecting our ability to build enduring client relationships
  - The Client Development Framework: Major building blocks to move from expert for hire to trusted advisor to client partner
  - The attributes of trusted client advisors; the four stages of client development
  - Client “Moment of Truth” case study: Demonstrating advisor skills in a first meeting
- 9:30            Listening and building trust
- The foundations of empathy: How to improve your listening skills
  - The trust formula
- 10:15           BREAK
- 10:30           Listening and building trust—continued
- Building trust: Client “Moment of Truth” (case study and role play)
- 11:00           Developing your Relationship Capital
- Developing a personal brand that attracts client inquiries
  - Identifying your critical few, priority hubs in six categories: Clients, prospective clients, catalysts, collaborators, counselors, colleagues.
  - Understanding who are Potentials, Connectors, Loyalists, and Multipliers; strategies for developing each
  - Staying in touch strategies: Ideas, connection, help, and fun
- 12:30           LUNCH
- 1:30            Growing Client Relationships
- The foundations of relationship growth—from the *client's*
  - Building relationships with 6 types of key individuals in any client organization
  - Growing one of your client relationships (small group work)
  - Client “Moment of Truth” (case study and role play)
- 3:00            Investing in your balance sheet: Making time for relationship building (group discussion and also case study)
- 4:00            Wrap up: Personal action steps, key takeaways