

How Strong Is Your Client Relationship?

For each of the 10 characteristics or factors, make a checkmark under the appropriate column	Competitive “Expert for Hire/Vendor”	Distinctive “Trusted Advisor”	Breakthrough “Trusted Partner”
Characteristic			
1. Trust			
2. Thought Leadership			
3. Inner Circle			
4. Transparency			
5. Loyalty			
6. Reference-ability			
7. Breadth of Relationships			
8. Breadth of Services			
9. Overall Relevance			
10. Financial Performance			

Note: If you are a sole practitioner, factors 1-6 and 10 will be the most relevant ones. If you represent a firm or company, then all 10 are important.

What would a client say about your role in each of the three categories?

Expert for Hire/Vendor:

“She and her team did excellent work for us. She really knows her stuff.”

Trusted Advisor

“He’s superb at what he does and has great business sense. I trust his judgment and use him as a sounding board for tough issues.”

Trusted Partner

“They are a long-term partner in growing our business. They always put our interests first, and add great value. We get the best they can offer.”