ANDREW SOBEL'S

Client Relationships Re-Imagined®

EARN CLIENTS FOR LIFE
AS A TRUSTED ADVISOR

Re-imagining how you develop and sustain client relationships.

Client relationships are more important than ever to your success. But they are also harder than ever to build.

Buyer sophistication, the rise of procurement, and unprecedented information transparency mean that traditional client development strategies no longer work.

Client Relationships Re-Imagined is a proven system for developing and growing clients. It builds new, powerful individual skills and organizational capabilities.

DO CLIENTS SEE YOU AS:

A Trusted Partner	OR	A Vendor
Who is part of their growth and profits?		An expense to be managed or even cut?

We teach organizations and individuals how to build their clients for life.

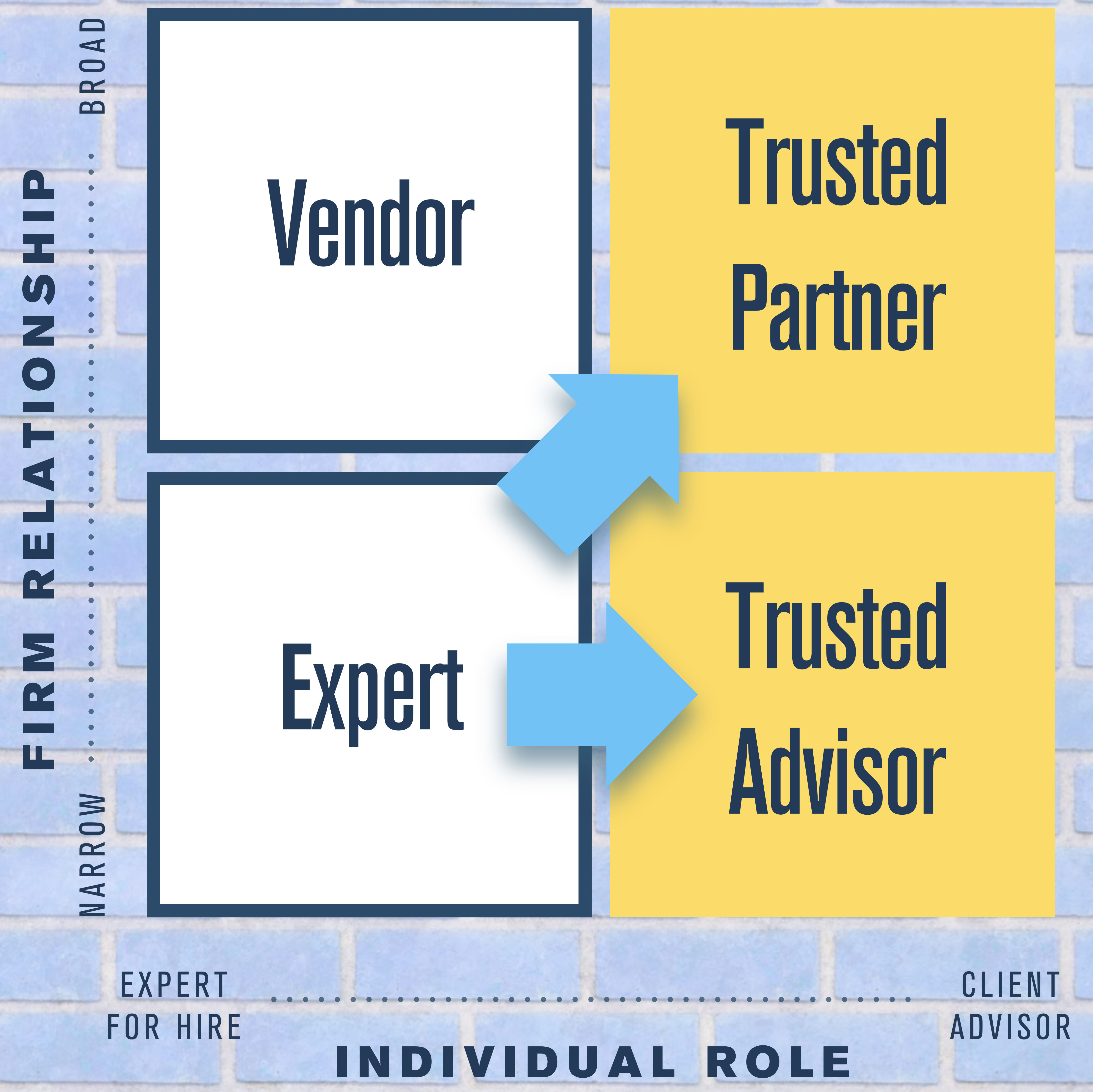
For over 20 years, we've conducted the most extensive research ever done on the ingredients of long-term client relationships.

Using our proprietary techniques, we've helped more than 40,000 client-facing professionals, in 53 countries, acquire more new clients and dramatically grow their existing relationships.

Transforming your role with clients.

The journey of building clients for life nearly always starts with an expert-for-hire relationship. We've developed a unique set of strategies and tools to help professionals systematically evolve into trusted advisors—and to help firms become a trusted partner to their best clients.

When the individual's role moves from a narrow expert to a client advisor, and the firm builds many-to-many relationships, the result is enduring, institutional relationships that drive steady revenue growth.



Traditional Strategies	Re-Imagined Strategies
Win the transaction	Win a long-term relationship
Build a relationship and then add value	Add value in order to earn a relationship
Cultivate a key buyer	Cultivate multiple stakeholder relationships
Push: Get your solution in front of buyers	Pull: Draw prospects in with thought leadership
Sell what you know	Sell what your firm knows

New skills.

Our programs institutionalize the strategies and skills needed to overcome the toughest relationship challenges.

Our clients learn how to:

- Differentiate themselves in commoditizing markets
- Develop sole-source business that is not competitively bid
- Use proactive agenda setting and powerful inquiry to learn vastly more about their clients' needs than any other competitor
- Build deep loyalty and become the provider of choice
- Move up and build relationships with senior executive sponsors
- Broaden and grow key client accounts and deliver the entire firm
- Win more new clients
- Stay in touch and add value — even when there is no business

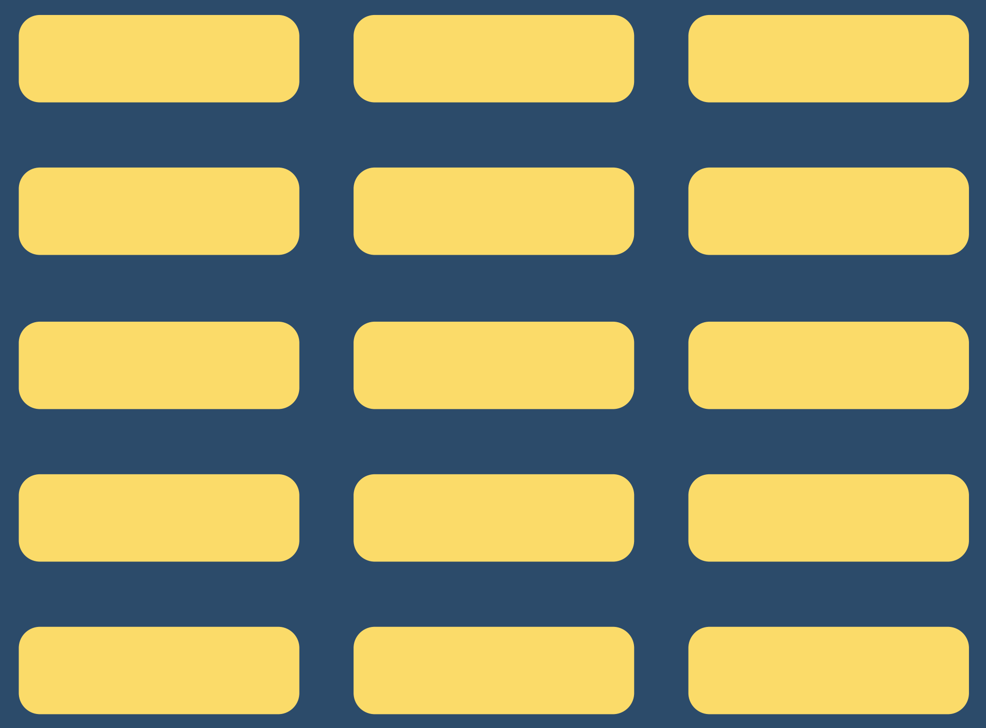
A proven approach for transforming skills and behaviors.

Professionals in a broad range of client sales, development, management, and support roles will benefit, including:

- Managers, Directors & Partners
- Relationship Managers
- Account Executives
- Client Service Managers
- Sellers and Business Developers

COMPREHENSIVE CUSTOMIZABLE CURRICULUM

4 Core Programs



15+ Topical Modules

INTEGRATED LEARNING METHODS

- Live & virtual training
- Mobile, digital learning
- Coaching
- Small accountability groups

A Modular System

Programs are customized from a collection of topical modules that can be arranged and sequenced to fit your organization's needs.

EXAMPLES OF COURSE MODULES

- **Introduction: Building Clients for Life**
- **Becoming an Agenda Setter**
- **Using Power Questions**
- **Listening**
- **Accelerating Trust**
- **Developing Big-Picture Thinking**
- **Growing Relationship Capital**
- **Staying in Touch and Adding Value**
- **Becoming a Thought Leader**
- **Creating Buyers as a Trusted Advisor**
- **Turning a Sales Pitch into a Collaboration**
- **Developing C-Suite Relationships**
- **Reframing Problems for Maximum Impact**
- **Building Personal Relationships**
- **Creating an Account Growth Plan**
- **Becoming a Person of Interest to Top Executives**

PROGRAM ONE

The Skills of the Trusted Advisor

Evolve from an Expert-For-Hire to Trusted Client Advisor and Build Clients for Life

We've conducted over 20 years of path-breaking research, interviewing thousands of successful advisors and the top executives who hire them, to identify the most important trusted advisor skills and strategies.

Expertise is essential, but by itself it is a commodity that will not truly differentiate you in the marketplace.

We help professionals—whether in client management or sales—develop a broader set of skills that enable them to ask powerful questions and listen deeply, understand their clients' most essential needs, rapidly build trust, and show how their solutions can drive important business goals.

The Expert	The Advisor
Tells	Asks great questions & listens
Is for hire	Has "selfless independence"
Stays within expertise	Is a deep generalist
Analyzes	Analyzes & synthesizes
Builds credibility	Builds deep personal trust
Is reactive	Is a proactive agenda setter
Sells	Creates a buyer

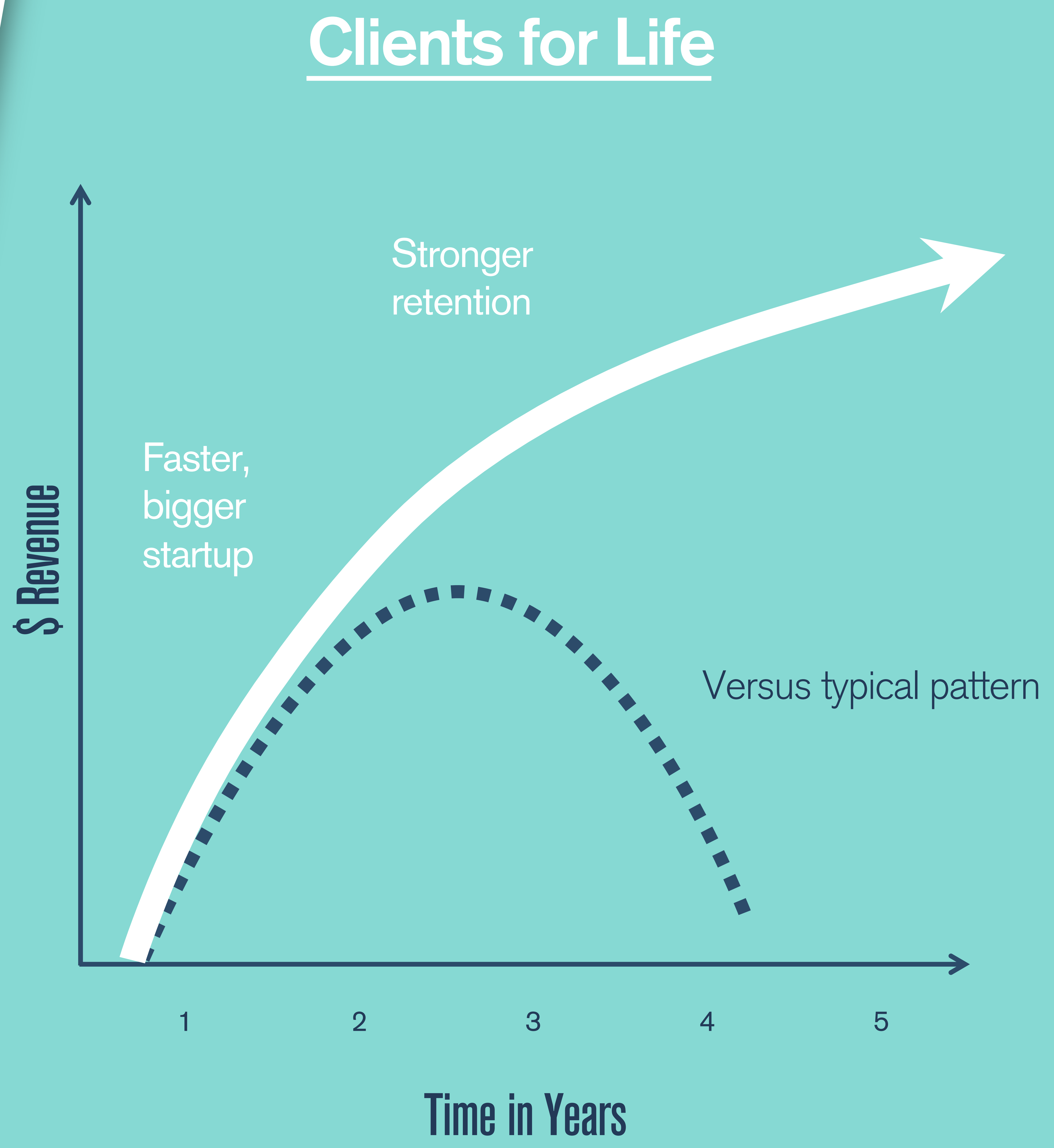
PROGRAM TWO

Growing Client Relationships

Build Flagship Institutional Relationships

Developing large, institutional client relationships requires a particular blend of strategies and skills. These broad-based relationships require both individual professionals who can act as client advisors and institutional support to help build many-to-many relationships at every level.

In this program, participants learn an essential set of growth strategies that will help them and their teams deepen and broaden their most strategic relationships. They leave the program with a robust growth plan for a chosen client account.



PROGRAM THREE

Developing C-Suite Relationships

Become a Person of Interest to Top Executives

It's hard to get a first meeting with a senior executive—and even harder to get a second one. The reason? Most professionals approach executives in entirely the wrong way. They don't add what we call "Value for Time." And out of fear of failure, they play not to lose rather than to win—which is a formula for a mediocre meeting.

Relationships with key leaders are essential. These top executives set strategy and influence important decisions even if they don't directly hire you.

In this in-depth program, participants learn an integrated set of skills and best practices that will enable them to move up in their clients' organization and cultivate powerful, senior executive relationships.

Typical Pitfalls of C-Suite Meetings

- **Walking in as a supplicant**
- **Overreaching: Having too many agenda items**
- **Asking boring, informational questions**
- **Focusing on your methodology—rather than the client's agenda**
- **Trying to sell something**
- **Talking too much and taking too long to get to the point**
- **Lacking flexibility and over-controlling the conversation**
- **Playing safe–and being unmemorable**

PROGRAM FOUR

Winning New Clients

Create Buyers as a Trusted Advisor

When you have the client advisor mindset—versus the expert mindset—you approach the sales process completely differently. Instead of selling solutions that are looking for a need, you create a buyer by identifying an urgent, "red" issue, and then building the client's trust and confidence in your ability to deliver for them.

We help professionals dramatically increase their effectiveness at selling and business development. These could be sellers who need to add more value in the sales process, or relationship managers who must drive greater growth into their existing accounts.

Our sales process is based on powerful behaviors and conversational strategies that help you advance the sale through five fundamental objectives. Our clients find it augments, rather than displaces, previous sales training their people may have gone through.

Preconditions for a client to buy

- **Your client perceives an urgent problem or opportunity**
- **The executive you're talking to "owns" the issue and can take action**
- **The client has a healthy dissatisfaction with the current rate of improvement**
- **They trust that you are the highest-value alternative**
- **The key stakeholders in the organization are aligned**

If any of these preconditions are missing…*there is no sale*

Mobile Learning

The most comprehensive digital learning resource of its kind,* Building Your Clients for Life *helps professionals excel at every stage of client development.

- 82 audio lessons covering 26 topics
- 37 HD videos
- 177 page workbook with summaries and application exercises
- Comprehensive Trusted Advisor Personal Online Assessment
- A powerful reinforcement to live training and coaching that can also be used as a stand-alone resource

Helping leading organizations worldwide

Selected clients

Bain & Company
Booz Allen Hamilton
AON Hewitt
The Ken Blanchard Companies
Mercer
Towers Watson
ZS Associates
PwC
Ernst & Young
Deloitte
Grant Thornton
Citigroup
UBS
Bank of America Merrill Lynch
ICICI
ANZ
Lloyds Banking Group
Rothschild
Norton Rose Fulbright
Osler, Hoskin, & Harcourt
Sidley Austin
WPP
Hill & Knowlton
Cognizant
Cox Communications
Experian
Xerox
CGI
Mphasis
Heidrick & Struggles
Egon Zehnder
Spencer Stuart
Hess
Weichert Workforce Mobility
TriNet
Lend Lease
Laing O'Rourke

"Andrew Sobel's techniques have been instrumental in building our 'client first' culture at Cognizant"

Francisco D'Souza, CEO, Cognizant

"Enduring client partnerships are essential to success, and Andrew Sobel delivers powerful insights about how to systematically cultivate and sustain them."

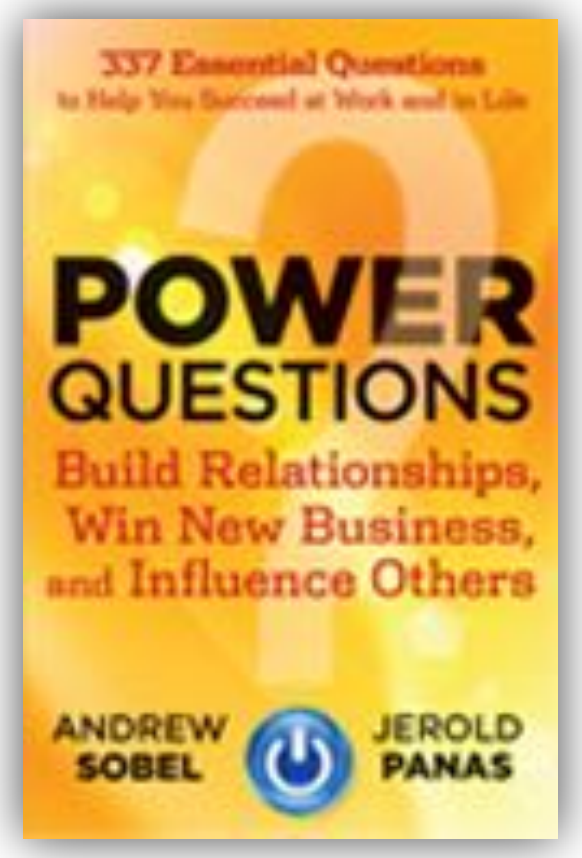
James Bardrick, CEO, Citigroup UK

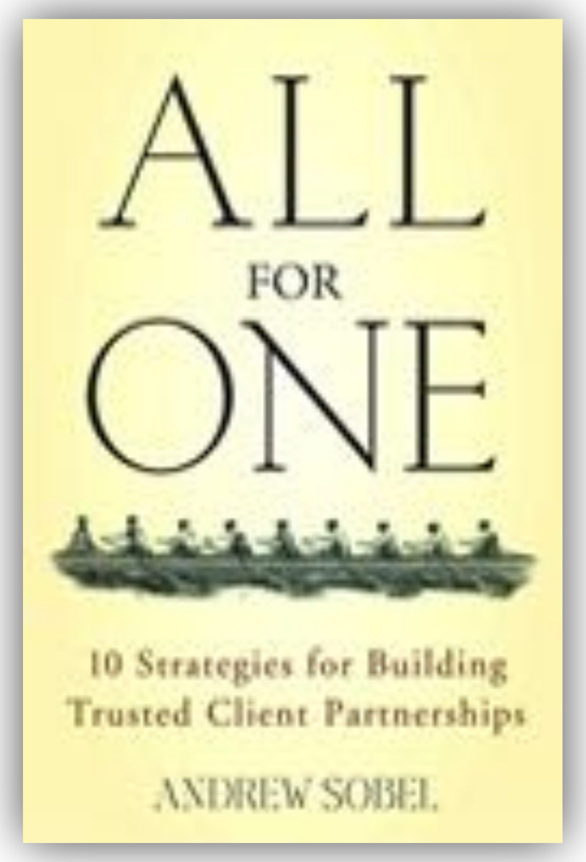
"With the credibility of an expert in the field, Andrew Sobel eloquently describes how to build trusted client partnerships"

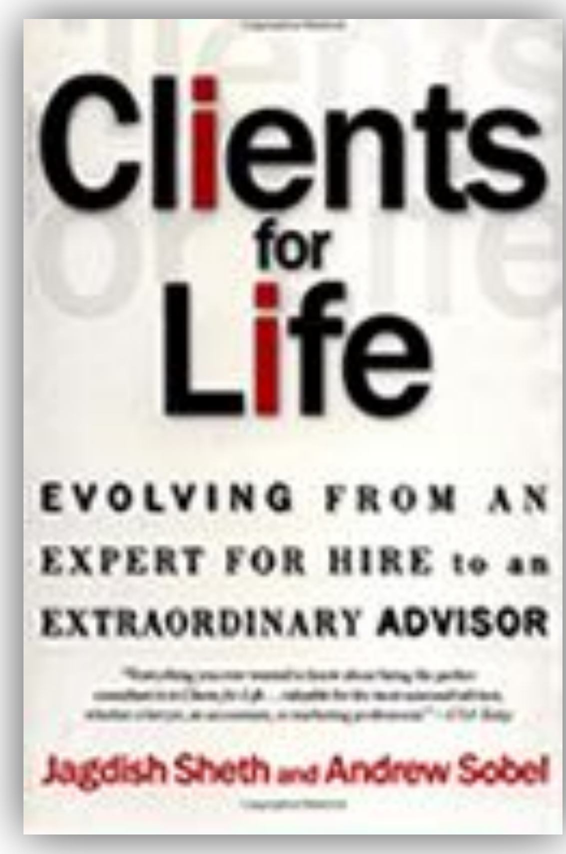
Sir Winfried Bischoff, Chairman, EMEA
JP Morgan Chase
& former Chairman of Lloyds Banking Group

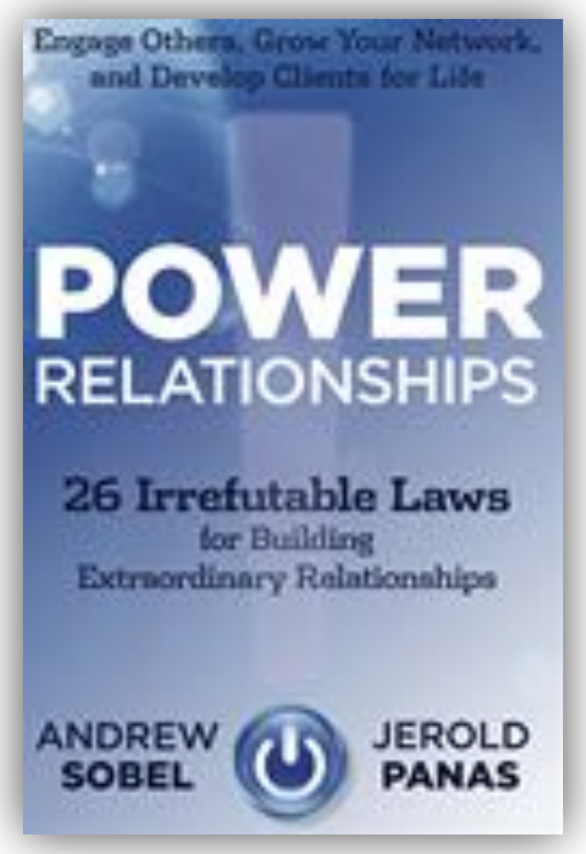
Based on best-selling thought leadership

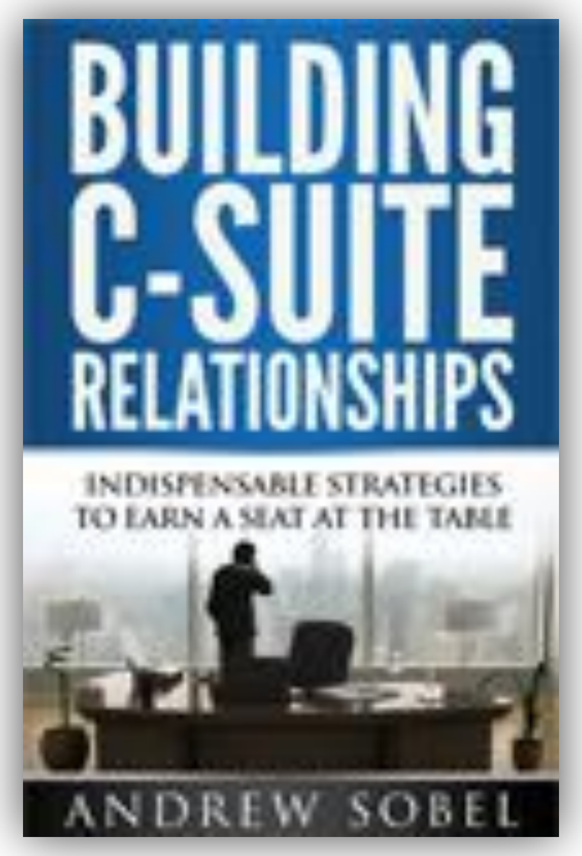
The Building Clients for Life books have been translated into 18 languages











"His deep expertise on what makes service firms successful makes Andrew Sobel's guidance accessible, credible, and invaluable."

Edward E. Nusbaum, CEO
Grant Thornton International

"Andrew Sobel clearly understands that trust is not an abstract concept–it is a personal bond forged over time in the best relationships."

Ralph W. Shrader, former Chairman and CEO
Booz Allen Hamilton

"Andrew Sobel's organisation implemented a Trusted Advisor programme that embraced nearly 1,000 relationship managers across our entire corporate banking business. The return on investment has been exceptional."

Diana Brightmore-Armour
Former CEO, Corporate Banking
Lloyds Banking Group
now CEO, ANZ UK

Growing your business from the inside out.

Companies often pin their hopes for growth on finding new clients and new markets, but your best growth opportunities, your existing clients, are right at your doorstep.

Andrew Sobel

Andrew Sobel is the leading authority on the strategies and skills required to build clients for life. He is the most widely published author in the world on this topic, having written eight acclaimed books on developing enduring business relationships. His books have sold over 250,000 copies and been translated into 18 languages.

Andrew's consulting, training, and coaching programs have been delivered in over 50 countries for many of the world's most successful companies. These include public corporations such as Citibank, Lloyds Banking Group, Hess, and Experian as well as leading private firms such as PwC, Booz Allen Hamilton, Bain & Company, Towers Watson, and Sidley Austin.

Andrew spent the first 14 years of his career with Gemini Consulting (formerly the MAC Group), where he became a Senior Vice President and Country Chief Executive Officer. He lived in Europe for over a decade and speaks four languages. For the last 20 years he has led his own international consulting firm, Andrew Sobel Advisors. He graduated from Middlebury College with honors and earned his MBA from Dartmouth's Tuck School. Andrew can be reached at AndrewSobel.com

Keynote address for a Big 4 firm, Orlando, Florida
Audience: 3500 Partners and Directors

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