

Agenda Setting

1 Learn their agenda.

Commit to memory your client's business and personal agendas (each containing three to five key priorities or goals).

2 Ask for the meeting.

Ask your client for 45 minutes of their time, saying, "I'd really like to better understand your plans and priorities." You will rarely be turned down.

3 Enlighten them.

Bring an incisive point of view or several thought-provoking questions into every meeting and every executive conversation you have.

4 Hold dedicated agenda setting conversations.

Create opportunities to rise above the day-to-day details of your work. For example, hold an annual relationship review or formal meeting each quarter to look at the big picture; get the client offsite; hold discussions tied into corporate lifecycle events such as planning, budgeting, performance reviews; hold informal discussions over coffee to "catch up"; and so on.

5 Ask thoughtful questions.

Use educated questions to help you understand your client's agendas. For example:

"At the end of the year, how will you be evaluated?"; "Our other clients in your sector are all grappling with x, y, and z. How would these resonate with your management?"; "What issues do you wish you could spend more of your time on? Less time on?"; "When you eventually leave this position and take on a different role, what would you have most liked to have accomplished?"

6 Create constituency perspectives.

Gain a deeper understanding of customers, investors, competitors, suppliers and others—of their needs and their perspectives on your client's business—and then bring these to your client.

7 Take a deep dive.

Pick a topic or issue of interest to the client and create a collaborative working session with the client around that issue.

8 Focus on the client's implementation agenda.

What management process are they using to manage the implementation? How do they rate their progress? Have goals and measures been established? Are the right people in place? What's taking too long?

9 Use research and market studies to stimulate a conversation.

It's not about the results of the research per se, but their specific implications for the client's business.

10 Commit to bringing your client two or three new ideas each quarter.

Hold a formal meeting to present and review these.

11 Hold an "idea day" for the relationship manager in charge of the client account.

Give him or her access to other experts in your company to review the relationship, discuss the client's business issues, and come up with ideas that could subsequently be presented to the client.