

# Building Clients for Life

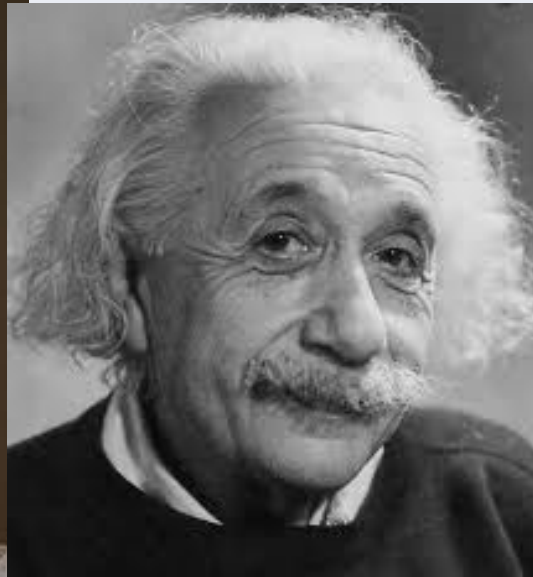
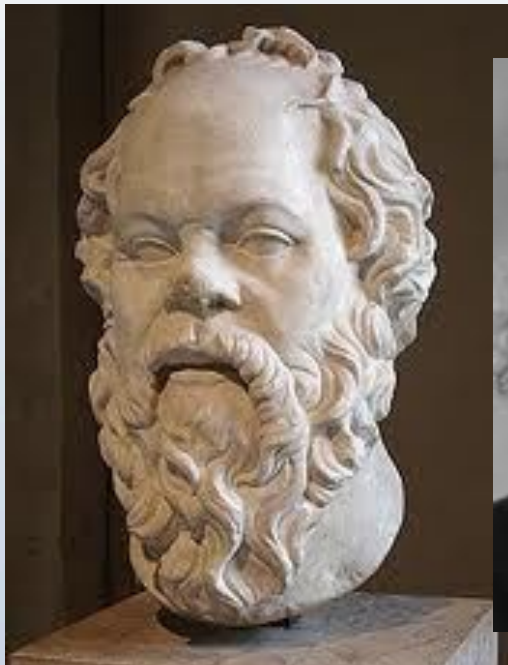
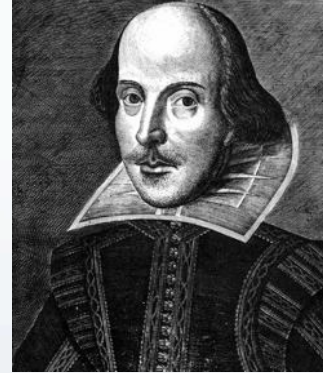
## Delivering the McGladrey Client Promise

Andrew Sobel Advisors

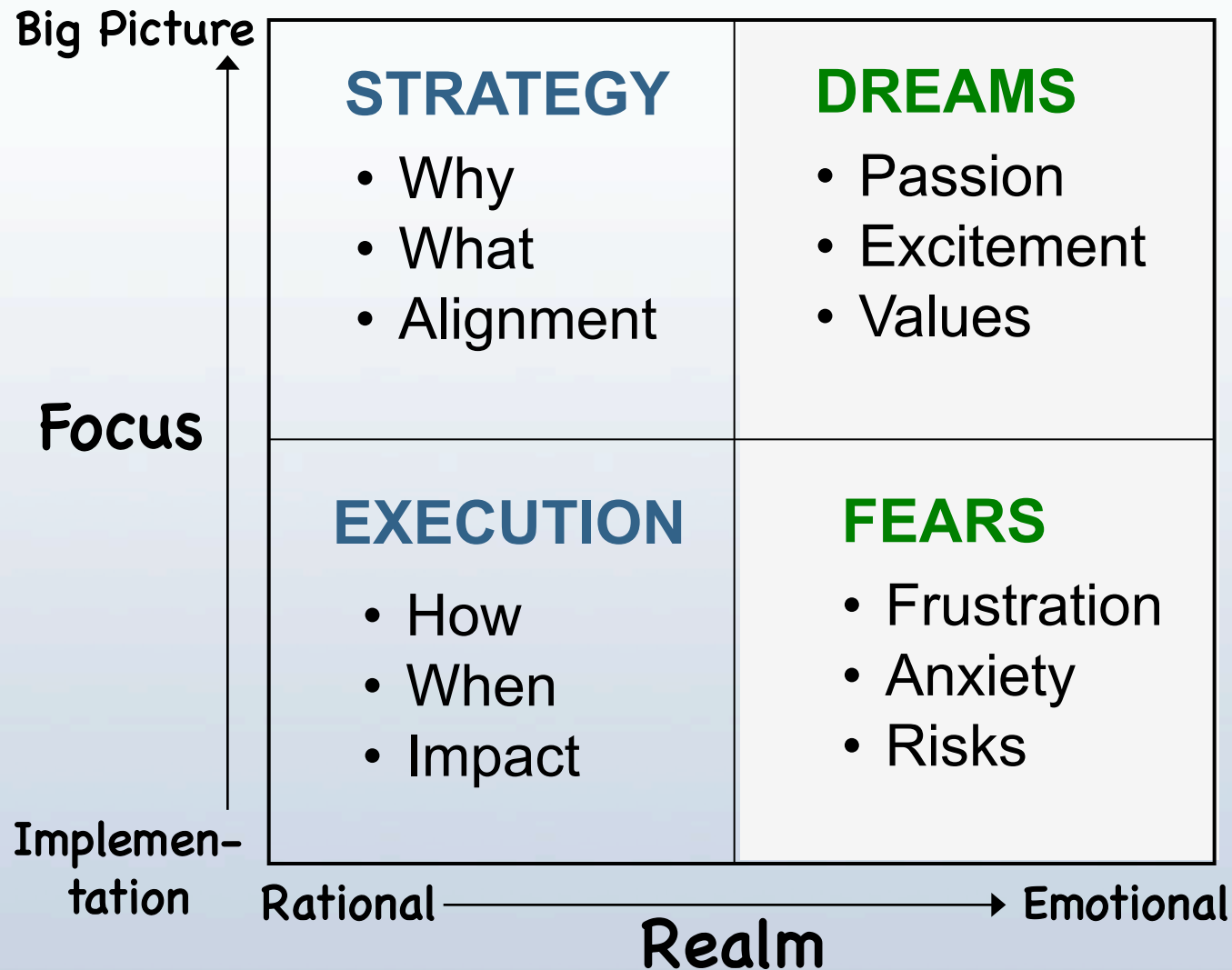
McGladrey Partner Meeting  
June 25, 2013

# Using Power Questions to develop client understanding

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# Four types of Power Questions



# Preconditions for the sale

1. Problem or opportunity
2. The executive owns it
3. Dissatisfaction with rate of improvement
4. Trusts you *and* believes you're the best alternative
5. Buyer feels key stakeholders are aligned



# Questions to ask your top clients every year

1. What's been valuable?
2. Communications?
3. Our team?
4. Know where to go to?
5. Goals and plans
6. Make doing business easier?
7. Reference or referral?

# Questions to ask your spouse, partner, or a loved one

1. Dreams?
2. Happiest day?
3. Your plans?
4. Excited about now?
5. How can I support you?
6. More/less time on?
7. Can we start over?

# Key moments to use questions with clients

- Sales: Ascertain readiness to buy
- Building credibility
- Learning their agenda
- Getting to know them
- Assessing the relationship

# Follow-up Resources

**<http://andrewsobel.com/asigra>**

1. A copy of my slides
2. Agenda Setting best practices
3. Power Questions list
4. First Meeting 32 pt. checklist