

Building Clients for Life

Delivering the McGladrey Client Promise

Andrew Sobel Advisors

McGladrey Partner Meeting
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The McGladrey Client Promise

- **Unmatched client-centric focus**
- **Rich, enduring relationships**
- **Clients feel truly understood**

The McGladrey Client Promise

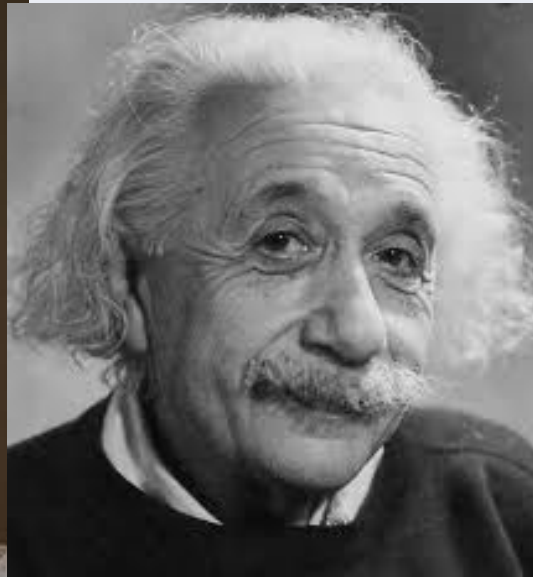
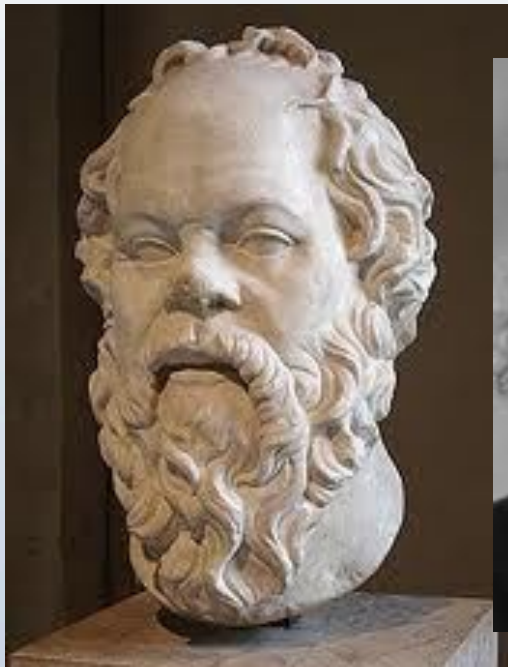
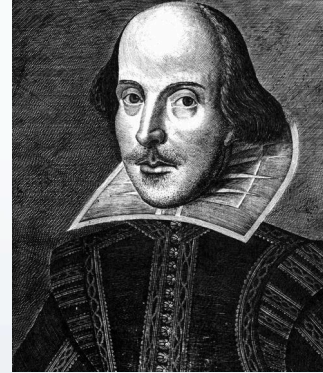
- Unmatched client-centric focus
 - 1. From expert-for-hire to client advisor**
- Rich, enduring relationships
 - 2. Becoming an agenda setter**
 - 3. Building institutional relationships**
- Clients feel truly understood
 - 4. Using power questions**

Building the trust that fuels collaboration

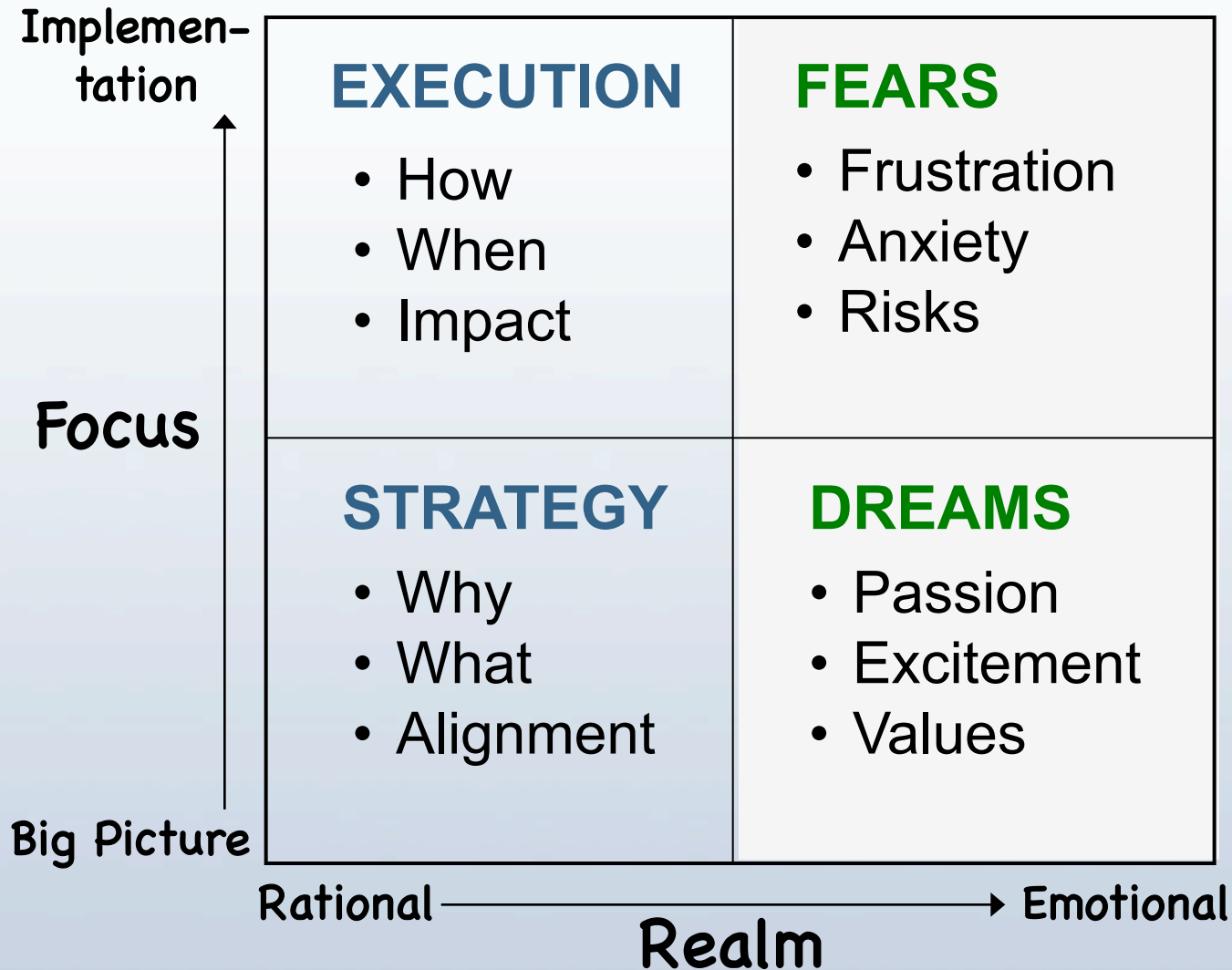


Using Power Questions to develop client understanding

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Four types of Power Questions



Follow-up Resources

<http://andrewsobel.com/mcgladrey>

1. A copy of my slides
2. The Beatles Principles summary
3. Agenda Setting best practices
4. Institutionalizing Relationships BP
5. Power Questions BP
6. First Meeting 32 pt. checklist

Actions to help fulfill your Client Promise

- 1. Embody the advisor mindset: e.g., define the totality of the problem**
- 2. Know their agenda--business and personal**
- 3. Lower your threshold to see a client**
- 4. Bring 3 power questions to every client meeting**
- 5. Reach out to one colleague/week for 15 minutes**