Andrew Sobel's

Client Relationships Re-Imagined®

Building Your Clients for Life

Curriculum Overview

Learning Objectives:

1. Learn key skills and strategies to become a trusted client advisor and build clients for life
2. Shift firmly from the "expert-for-hire" mindset to the client advisor mindset in all your client interactions
3. Learn to turn a contact into a client and to grow and expand a client relationship over time

Two-Day Curriculum Includes:

- ✓ Participant workbooks with exercises and assessments
- ✓ All slides and graphics
- ✓ High-definition video dramatizations of client meetings
- ✓ Case studies and role plays
- ✓ ...and also, upon arrangement, fully annotated Leader Facilitation Guides.

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Client Relationships Re-Imagined: Building Clients For Life

Curriculum Overview

DAY ONE

Topic	Key Points	Supporting Content, Assessments, and Planning Tools
Introduction and Overview (90 Minutes)	▪ Course Roadmap ▪ What do clients really want? ▪ The evolution from Expert for Hire to Trusted Client Partner ▪ The client growth matrix ▪ Definition of a great client relationship	▪ Client portfolio assessment ▪ Individual self-assessment: Do you have the expert-for-hire mindset or the client advisor mindset?
Agenda Setting (105 Minutes)	▪ Moving from a reactive order-taker to a pro-active Agenda Setter ▪ How to understand your client's business and personal priorities ▪ Connecting your work to the client's highest-order goals ▪ Creating sole-source business through Agenda Setting ▪ Agenda Setting best practices	▪ Agenda Setting self assessment ▪ Video dramatizations of best and worst practice ▪ Client application exercise
Power Questions (90 Minutes)	▪ Why questions can be more important than answers ▪ The Power Questions Matrix: Questions to address the rational versus the emotional; strategy versus implementation. ▪ How to use Power Questions to develop and deepen your relationships ▪ Questions you should never use or ask ▪ 3 foundations of great listening; listening best practices	▪ Agenda Setting self assessment ▪ Video dramatizations of best and worst practice ▪ Client application exercise ▪ Power Questions lists
Building Relationship Capital (90 Minutes)	▪ Identifying your "Critical Few" 15-20 relationships ▪ Five types of individuals you must build strong relationships with ▪ How to develop your personal brand/marketplace renown to attract clients ▪ Four ways to add value as you stay in touch ▪ Building your own staying-in-touch plan	▪ Relationship Capital application exercise and personal relationship-building plan development

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DAY TWO

Topic	Key Points	Supporting Content, Assessments, and Planning Tools
Creating Buyers (180 Minutes)	▪ The five preconditions for an executive to become a buyer ▪ How to set and sequence your agenda for four specific types of sales meetings ▪ Acting like a trusted advisor in the very first conversation with a client ▪ Strategies to achieve five critical goals in any business development discussion ▪ The power of showing versus telling ▪ Using powerful but simple conversational tools: Client examples, credibility-building questions, and industry/functional points of view	▪ Video dramatizations of best and worst practice for handling a first meeting ▪ Client case study: The skeptical client ▪ Client application exercise: setting the agenda ▪ Client application exercise: using a client example or "what we find..."
Growing Relationships (120 Minutes)	▪ How to choose the right clients to invest in ▪ Expanding your client network of relationships ▪ The relationship expansion matrix: Four directions you can grow in ▪ Making targeted investments to spur growth ▪ Capitalizing on external "Growth Catalysts" to expand your relationships (e.g., a reorganization, a new executive, a crisis, an incumbent transition, etc.) ▪ Creating your own "Growth Catalysts" ▪ The 10-Minute Client Growth Plan: 7 essential questions to ask about every client	▪ Client application exercise: segmenting your clients ▪ Client application exercise: selecting growth strategies for a key client ▪ Case study and role play: Building trust with a new executive. Includes video dramatization of best and worst practices for the role play
Q&A and Personal Action Planning (60 minutes)	▪ Q&A and open group discussion about participants' client challenges ▪ Key takeaways from the course ▪ Personal action plans	▪ Personal action plan

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