

BUILDING C-SUITE RELATIONSHIPS

INDISPENSABLE STRATEGIES
TO EARN A SEAT AT THE TABLE



ANDREW SOBEL



Dear Reader,

My mission is to help you build clients for life. To do that, and to make a lasting impact on your clients, you need relationships with senior decision makers in the C-Suite and in other leadership roles. During three decades of advising corporate leaders, I've come to realize not only how important these relationships are but also how challenging it is to develop them. That's why I wrote *Building C-Suite Relationships*. In it, I've synthesized and explained the strategies that the most successful professionals in the world use to connect at the top.

If you know others who would benefit from these techniques, please pass this on to them. Here's the link for your colleagues and friends to download the book for free: <http://andrewsobel.com/>.

All the very best,

A handwritten signature in black ink that reads "Andrew Sobel". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Andrew Sobel

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1

WHY THE C-SUITE?

Experience is the best teacher, which is why the tuition is high

Years ago, before I built my own consulting practice, my old firm had the opportunity to propose a major consulting project for a Fortune-500 company. The team put in months of work. They interviewed a dozen company executives at all levels. They even went out and spoke to customers to get their perspectives. They created an in-depth, value-added proposal that was thorough and convincing. The document was as thick as a history book and heavy as a brick. It clearly showed the benefits of doing the work.

At the final presentation, where they expected to get an immediate go-ahead, the CEO showed up. It was the first time they had met him. They had accepted the client's reassurances that the CEO didn't have to approve the multi-million dollar price tag for the project—"It's in the budget!" they were told.

The CEO listened carefully to the well-articulated pitch. He reviewed the handouts with interest. When it was over, he stood up, looked around the room, and said, "Thank you very much for your time. This was an excellent presentation." There were smiles all around! The high-fives were almost ready to spring up.

"However, there is no way we're paying outsiders to do this. This should be an internal project. We can do this ourselves." And

then he walked out.

It was a painful experience for my colleagues. But it's one we can all learn from.

While most of the actual purchasing of outside products and services is done at lower levels, the C-Suite still has enormous sway over who gets chosen and who is retained.

The fact is, if you want to have impact and develop your clients for life, it's increasingly important to have relationships with senior decision makers. I wrote this eBook to help you improve your skills at developing these essential relationships.

In the next eight chapters, I'm going to:

- Explain why C-Suite relationships are more important than ever.
- Describe the intense pressures that top executives are under and the concerns they have.
- Share with you the eight attributes of successful senior management advisors.
- Describe a variety of powerful strategies that will help you access C-Suite executives and build ongoing relationships with them.

At the end of each major section, I've created a special worksheet for you to apply what you've learned to your own client relationships. If you complete these exercises, you will end up with a powerful, personal plan to earn a seat at the table with your most important clients. For your convenience I've also put all these worksheets together at the end of the book, in Chapter 10.

The strategies set out in this eBook are based on the most comprehensive research that has been conducted into the ingredients of successful top executive relationships. Over the last 15 years, I have personally interviewed nearly 1,000 senior executives—including more than 200 CEOs—about their most trusted relationships with external advisors and suppliers. I have also interviewed or surveyed thousands of highly successful rainmakers in a variety of professions.

In my own career, which spans 30-plus years of senior management consulting, I have been fortunate to have built personal relationships with and advised several hundred C-Suite executives. The following chapters draw on the most appropriate findings and best practices from all of these different sources.

The C-Suite
still has
enormous sway
over who gets
chosen and
who is
retained.

C-Suite executives are different from you or me

Senior Executives Think Beyond Costs

A mid-level human resources executive, for example, usually has a *cost* budget. The fact that your proposal will grow revenues and impact the top line won't really move them the way it would a more senior executive who is focused on *revenues* and *profit*.

I use the term “C-Suite” to refer both to actual C-Suite executives as well as other organizational leaders who set strategy and make important decisions. So, in the C-Suite I’m talking about people like the Chief Executive Officer (CEO), Chief Financial Officer (CFO), Chief Human Resource Officers (CHRO), and so on. But, I also include in this group other senior decision makers, such as functional heads, division general managers, and so on. It may not be technically correct, but for our purposes I use the term C-Suite synonymously with company leaders—with senior management.

But first: Why bother? You may currently have great relationships with mid-level managers who have ample budget for your work. Who needs the C-Suite?

Here’s the problem: Powerful trends are turning you and your products and services into commodities. When your only relationship is with that mid-level buyer, you are at grave risk. Here’s what can happen:

- The client executive you’re working with may have to turn the buying process over to their procurement department, which will try and make you “comparable” to other providers and get your price down.
- Your client will have to follow the dictates of senior management. If they implement a cost-reduction program, you may become one of the first casualties because your client doesn’t have the clout to protect your contract.
- You will be asked to address narrowly-defined problems with narrowly-defined solutions. Executives at more senior levels are more apt to take a broader, enterprise-view of the problem and the solution.

In contrast, C-Suite executives and other senior decision makers:

- Can create a budget for you where there was none.
- Are focused on revenues and profits, not just costs. Therefore they will more readily see the value in a larger, higher-impact proposal.

- Make decisions about strategy and policy, which you need to understand in order to put your services in a bigger context.
- Can unblock a sale that is stuck.
- Can often approve large engagements. If they don't know you, all your great work with a lower-level executive—and that terrific proposal you wrote—may be for naught.
- Can recommend you to other top executives.

Remember, too, that it's much easier to go into a company at the top and move down into implementation work than to start at a lower level and move up into the C-Suite!

Do top executive relationships really need a different approach?

The basic relationship-building process is the same at all levels. You establish rapport, build trust in your competence and integrity, add value in the conversation, and identify a need you can help them with. These are the things that jumpstart the relationship-building process.

But...there are some important differences in terms of what top executives need and value, and in the skills that are required to engage with them. To understand what these are, you need to get a glimpse into a day in the life of a C-Suite executive.

Before you go on to the next section, complete Exercise One. It will help you begin to lay out your own strategy and plan for building C-Suite relationships with your clients.

EXERCISE ONE:

Using the following worksheet, list the names of three major client organizations with which you are currently working. Under that client (company) name, write down the name of a senior executive at the company with whom you would like to develop a relationship. Then answer the three questions that follow. If you wish, you can type your answers into the actual forms and then print them out.

WORKSHEET ONE

Which Senior Executives Would You Like to Build a Relationship With?

<p>1. List a key senior executive you'd like to build or deepen a relationship with.</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>
<p>2. Why is it important for you to make this connection?</p>			
<p>3. What is your specific objective?</p>			
<p>4. What's getting in the way?</p>			



A DAY IN THE LIFE

I read the news today, oh boy!

Senior executives have always, so to speak, been in the hot seat. Over the last several decades, the pressures on them have intensified and new ones have appeared.

On any given day, this is what they face:

- **Expectations are very high.** Just as CEO salaries have grown, so has the compensation of the next tier of corporate executives. It is not uncommon now to have HR heads or division presidents who have pay packages well into seven figures. Correspondingly, performance expectations have grown.
- **Timeframes are short.** Executives are under intense time pressure to accomplish their ambitious goals, and they in turn demand speed from others. Ten or fifteen years ago, it would have been normal to spend six months “studying” a problem. Now, clients want to start implementing within weeks.
- **Time is scarce.** Most senior executives could fill each day three times over just meeting with people who want to see them. So, they must carefully control their schedules. There must be a compelling reason for them to take an hour out

of their day to see you. They must see you as being extremely relevant to their agenda of critical goals and priorities.

- **Top executives are in the media spotlight.** The slightest misstatement, bad joke, gaffe, or misstep can quickly ruin an executive's career. One angry email, sent in haste, can destroy 25 years of ethical conduct and hard work.
- **Executive turnover is very high.** Today's executives face intense pressure not only to meet financial and operational goals, but also to *not* make mistakes. They cannot afford to go to their boards and shareholders with a major surprise, since it can mean the end of their tenure.
- **They face more choices than ever.** For every business decision they must make, top executives have a plethora of choices available to them. Deciphering complex issues such as globalization and the impact of technology means executives have to put more time, energy, and thought into separating the wheat from the chaff in order to make the right decisions.

Evergreen C-Suite concerns you can align with

You need to understand senior executives' *personal* and *business* agendas if you aspire to be their trusted advisor. Each person's issues will be slightly different, but here are the most common ones that can guide you as you engage with your clients. First, the personal side:

1. **Career.** All executives are deeply concerned about their careers. They're wondering: "How am I doing in my current role? What does my boss think about my performance? What should my next career move be? Do I have broader support in the organization? Should I think about leaving for a new company?"
2. **Relationships and network.** When it comes to investing their personal time, one criterion that executives often consider is "Can this individual or organization extend my network and provide valuable contacts for me?" Everyone can offer opera tickets and seminars; however, truly valuable personal contacts are proprietary and not subject to gift rules or other corporate restrictions.

Are you aligning with and connecting your work to your client's agenda of three to five critical priorities and goals?

3. **Wealth.** While executives think about personal wealth creation a lot, they discuss it very little. Given today's levels of executive compensation, the stakes for some are very high indeed. It's possible that the success or failure of your work could in fact have a measurable impact on a client's net worth.
4. **Personal life.** In the end, every client is human and has a personal life, which usually revolves around family, friends, and personal pursuits. If you'd like to connect more deeply with your clients, you *must* understand and appreciate this aspect of their lives.

Here are the most common business concerns of C-Suite executives:

1. **Growth and innovation.** Profits drive stock price and value, and the perennial concern of the corporation's top officers is: "Where is our future growth going to come from?" Advisors who can squarely and convincingly connect their service offering to increased growth will get management's attention.
2. **Costs.** Cost cutting, in many organizations, has gone from a periodic exercise to an ongoing program of cost review and management. Every service provider must be aware of the cost pressures that clients experience, and put a singular focus on value. This also means that any proposal that will help a client get more effectiveness out of their expenditures—more bang for their buck—is going to get noticed.
3. **The capital markets.** The investors and credit institutions that provide equity and debt financing to a company are crucial constituencies. The most senior executives in any corporation spend a lot of time focused on what their investors think, their access to additional funds, and their stock price if they are publicly traded.
4. **Risk.** There is no question that today's business environment is fraught with risks for executives at every level. No one wants to have to face their boss or the company's board and say, "Something very bad has happened that we did not anticipate."
5. **The senior team.** All executives think long and hard about their team of senior managers. Are they the right individ-

uals for the job? Are they aligned to the strategy? Do they work as a team and collaborate? Can their performance be improved? Often this is an area where you can add surprise value by offering insights about how to improve the performance of your client's senior team.

Exercise Two, on the next page, will help you identify the most critical concerns of your own particular clients.

EXERCISE TWO:

What are the three or four most important concerns of the C-Suite executives you know or are currently working with? How does your service offering or product address those concerns? Use the worksheet below to record your answers.

WORKSHEET TWO

C-Suite Concerns and Pressures

1. What are the specific concerns of the top executives you know and work with?	1. _____ 2. _____ 3. _____ 4. _____ 5. _____
2. How do your services address these concerns?	1. _____ 2. _____ 3. _____



3

DO YOU HAVE WHAT IT TAKES?

The skills and attributes of trusted client advisors

We've looked at the pressures that C-Suite executives are under and the classic concerns they are focused on. Let's pause now and review the skills and behaviors—what I call *attributes*—that you must cultivate if you want to evolve from a commodity expert-for-hire to a top management advisor.

The eight attributes of successful client advisors

Successful professionals who consistently build long-term executive relationships cultivate and exemplify eight attributes that set them apart from ordinary vendors or “experts for hire,” as I call them.

These eight attributes are essential to becoming a trusted advisor to your clients. By *trusted advisor*, I mean someone who is part of their inner circle rather than a narrow expert who is a tradable commodity. These characteristics can be divided into *foundational* attributes, *thinking* attributes, and *character* attributes, as illustrated in the following graphic:

Senior client executives hire experts, but they keep *advisors* for the long term.

The Client Advisor Attributes



Why *these* attributes and not others, such as optimism, drive, intelligence, good communications skills, or charisma? Quite simply, these eight are the qualities that set you apart in the client marketplace. They are research-based, and represent the attributes or qualities that the top executives I have interviewed consistently refer to. They have been validated with tens of thousands of service professionals from many fields during the workshops I have taught on long-term relationship building. And, these are the attributes that allow you to add great value and build deep, personal trust with clients. (Note: seven of these attributes were set out in my first book, the bestselling *Clients for Life*, more than a decade ago. I have added one—agenda setting—but the original seven continue to be validated and still ring true, at least according to client executives and the best “trusted advisors” at the companies I work with).

Here’s a brief description of these attributes. For each one, I contrast the expert-for-hire with the client advisor:

1. **Selfless Independence**

Experts-for-hire ultimately seek through compromise and deference to please the clients who employ them; advisors

The Foundations of Empathy

There are three basic enablers of empathy: Self-awareness and self-control, which allow you to perceive others, as they really are independent of your own biases and neuroses; humility, including a belief that you can learn from your clients; and keen listening skills.

exercise selfless independence. Great advisors are devoted to their clients but independent from them—intellectually, emotionally, and yes, even financially (at least in terms of their *attitude*). To be an influential advisor to your clients, you must look after their interests but also offer independent views, even if they are opposed to beliefs your clients hold dearly. The late, great Sir Brian Pitman, the former CEO of Lloyds Bank (now Lloyds Banking Group), once told me, “If the investment bankers I work with would say ‘no’ more often, I would say ‘yes’ more often.” Sir Brian’s statement really sums up the power of selfless independence. It is a foundational attribute for anyone who wants to work in the C-Suite.

2. Empathy

Experts provide answers and tell; advisors ask great questions and listen. The great artist Picasso once said, “Computers are useless. They can only give you answers.” Management sage Peter Drucker told a journalist he was not a consultant but rather an “insultant,” a distinction reflecting the difficult, provocative questions he asks his clients. As professionals, we are trained to provide answers, but in many important respects, thought-provoking questions that help clients reframe their issues are more useful. To successfully empathize with clients, you have to tune into their feelings, their thoughts, and the context of their daily lives.

3. Deep Generalists

Experts have depth; advisors are deep generalists who have knowledge depth and breadth. Many professionals spend their whole careers drilling deeper into their core expertise, rarely investing the time to broaden their experiences and make the knowledge connections necessary for big-picture thinking. It’s understandable: Clients do hire experts. Even CEOs look for and hire a service provider based on proven, in-depth expertise. But although they hire experts, in the longer term they gravitate towards individuals who also have breadth, who are deep generalists.

4. Synthesis

Experts analyze; advisors synthesize. Listen to what C-Suite executives have told me about their most valuable and trusted providers:

Agenda Setting

“I track our top 100 clients on a daily basis, and I look for news and developments that may affect them. You also have to *ask* about your client’s issues. I will often say, ‘Could I spend a half hour with you to better understand your challenges?’ Obviously, you do your homework and have to be prepared. But I have never met a client who said ‘No, I don’t want to spend time talking to you about my business.’ It’s just never happened—ever. When I go to meet with a CEO or CIO at one of our clients, I always try to understand what their agenda is and how our work is supporting that agenda. Whether it’s a cost reduction or time-to-market issue, I map our work to that objective and try to articulate how we are helping the client to achieve it.”

Francisco D’Souza,
Chief Executive Officer,
Cognizant

- “He gives me a global view.”
- “She provides additional perspective and helps me to re-conceptualize the problem.”
- “He brings big-picture thinking to the discussion.”
- “He handles the details, tactics, but is also able to see the overall strategy.”

Top clients treasure synthesis, or big-picture thinking, in their professional advisors, not least because they are so often unable to get this from their internal staff. Analysis is a commodity. Synthesis, in contrast, is less common. It means finding patterns, identifying key issues, framing ideas in a way that clarifies them, and creating new ideas out of old data. Synthesis provides those rare “new perspectives” that C-Suite clients are always looking for.

5. Agenda Setting

Experts respond to their client’s requests. They are “agenda reactors”; advisors seek to understand, inform, and shape their clients’ agenda of key priorities. They are proactive agenda setters. A common complaint that clients make to me is that their external service providers do not sufficiently connect to their agenda of critical priorities. Whatever work you are doing for a client, no matter how technical or specialized, you must always relate it to your client’s broader agenda. You begin, naturally, by “agenda sensing” in order to understand your client’s goals and plans. Eventually you want to be in a position to help influence and improve your client’s overall set of priorities, not just respond to them.

6. Judgment

Experts make judgments based on the facts; advisors first help their clients avoid bad judgments, and then they base judgments on facts, experience, and on their and their clients’ personal value systems. Top management advisors avoid the many well-documented judgment traps. These include the confirmation bias (seeing what you want to believe), the recency bias (being overly influenced by the most recent, dramatic event), and the prior commitment bias (making a bad decision because of a previous commitment), and so on. Great advisors make judgments by bringing their own and their clients’ unique value systems into play. The result is often an unusual but highly effective solution. In practical

Lower Your Threshold for a Client Meeting

Client advisors are also experts. The difference is your mindset. Do you approach your clients with the “expert mindset” or the “advisor mindset?” It makes all the difference in the world. When you have the expert mindset, for example, you feel like you have to have the answers. You meet less with clients because of a fear that you won’t be sufficiently prepared for what they may ask you. When you have the advisor mindset, however, you know that a few well-chosen questions can stimulate a vibrant, value-added conversation with a senior executive. So you lower your threshold for a client meeting, and consequently build deeper, more personal relationships over time.

terms, this means that a “correct” decision for one client might be, because of organizational and cultural values, a wrong decision for another.

7. Conviction

Experts have conviction based on the accuracy of their information; advisors have deep-seated conviction based on personal values and a sense of mission. Clients are deeply moved by genuine, heartfelt conviction. For many famous advisors, in fact, their defining moments have come in making those difficult decisions based on strongly held convictions. Think of Sir Thomas More refusing to endorse Henry VIII’s split with the Catholic Church so he could marry Anne Boleyn, or General George Marshall, who had the conviction to repeatedly stand up to British Prime Minister Winston Churchill and his own client, Franklin D. Roosevelt, when critical military decisions were being made during World War II.

8. Trust

Experts have professional credibility; advisors build personal trust. When you’re credible, clients believe that your data is accurate and your information is useful. Trust, which is the glue that holds together every long-term client relationship, goes far deeper. It’s a client’s belief that you will act in her best interests and personally uphold the highest standards of integrity and competency, both inside and outside the office. When a client trusts you, anything is possible. Your recommendations carry more weight, and when you propose an additional sale, your client sees sincerity, not salesmanship.

Trust is based, fundamentally, on the client’s perception of:

- Your integrity (including honesty, discretion, and reliability)
- Your competence (can you do the job?)
- Your orientation (are you self-oriented or client-oriented? whose agenda are you working?)

Trust is also impacted by *face time*, which enhances trust, and the *risk* of trusting in any given situation.

As I said, there are other characteristics and skills that are necessary to succeed in business and life in general. The

eight discussed here, however, are specifically needed to develop long-lasting relationships with senior executives.

In the next section, we're going to review C-Suite access strategies. Before you go on, take a moment to assess your own mindset. Are you more like the expert for hire or the client advisor in the way you approach your relationships?

EXERCISE THREE:










Review the next worksheet, which will help you think about the extent to which you have the expert versus the advisor mindset. In the middle column, check a box above the arrow to indicate whether you think you're towards the left, in the middle, or towards the right for each attribute listed. Where do you think you need to improve?

Here's an example of how to fill out the assessment:

<i>The Expert Mindset</i>		<i>The Advisor Mindset</i>
OFTEN:	Where would you place yourself on a continuum?	OFTEN:
Is for hire—says "Yes"		Is independent—willing to say "No"
Tells and gives answers		Asks good questions and listens
Is a specialist		Is a deep generalist, combining knowledge depth with breadth
Is good at analysis		Is a big picture thinker who is good at analysis <u>and</u> synthesis

WORKSHEET THREE

Do You Have the Expert Mindset or the Advisor Mindset?

<i>The Expert Mindset</i>		<i>The Advisor Mindset</i>
OFTEN:	Where would you place yourself on a continuum?	OFTEN:
Is for hire—says “Yes”		Is independent—willing to say “No”
Tells and gives answers		Asks good questions and listens
Is a specialist		Is a deep generalist, combining knowledge depth with breadth
Is good at analysis		Is a big picture thinker who is good at analysis <u>and</u> synthesis
Is reactive		Is a proactive agenda setter
Builds credibility		Builds personal and professional trust
Sells		Creates a buyer
Focuses on transactions		Focuses on relationships
Has a scarcity mindset (sees limitations and risks)		Has an abundance mindset (sees possibilities)



Please let me into your club!

We've looked at the pressures that C-Suite executives are under and the classic concerns they are focused on. We've also reviewed the essential attributes of senior management advisors. Now, it's time to figure out how to get *access*.

Here are ten ways to get access to the C-Suite. Some of these are long-term strategies (e.g., building your brand), whereas others are short-term tactics (e.g., getting an introduction from a peer of the executive you want to meet).

1. **Follow the person, not the position.** Most top executives have brought their advisors along with them over many years. While it is not impossible to break into someone's inner circle after they have achieved great success, it's also not an easy task.

Just look at what US presidents do. After they win the election, whom do they put into key roles in their administration? Do they scour the land for smart and capable people they have never met? No! They draw on tightly-knit networks of those they know and trust. They put the individuals who led their campaigns and advised them in other roles into the important positions. So it is, also, in business organizations.

Look around you. Whether you're 20 or 50, you know people who are going places. Identify interesting, talented people at every stage of their development. Follow them, stay in touch with them, and cultivate these relationships over many years. Some will go on to become leaders in their organizations, and you will have known them at the beginning of their careers.

C-Suite executives are drawn to experts who are the best in their fields.

2. **Build your brand.** C-Suite executives gravitate towards people they have known for years, but they also are drawn to experts who are the best in their fields. If you're a CEO, and you're looking for someone to help facilitate your next strategic planning offsite, it's unlikely you'll settle for someone who happens to live nearby and is cheap. More likely, you'll want to get someone who is outstanding in his or her field—someone who has a brand. You need to invest to build your reputation as a thought leader in your field or specialty.
3. **Publish and speak.** One of the best ways to support your brand is to become a published author. Some people achieve this through commercially published books and articles, but nowadays you can also build your thought leadership through many different online platforms as well—blogging, online publishing, newsletters, and so on. Publishing and speaking at reputable events are important because these are effectively third-party endorsements of your capabilities. If you say you're great to a client, it's puffery. But if a professional association implicitly endorses you by putting you on a panel at their conference, it's a more believable testimonial. When you publish and speak, it raises the likelihood that executives will notice you and seek you out if they like your ideas. And when they call you first, the discussion is very different than if you are cold-calling them.
4. **Get introduced by a peer.** Surveys show that 75% of senior executives will take a meeting with someone they don't already know *only* if that person has been recommended to them through a trusted colleague or friend. Who do you know who knows the executive you want to meet? You should explore every possible connection you have and try to network your way to them.

There are many non-commercial avenues at which to get to know executives before you try and pitch your services.

5. **Gain access through a more junior executive.** You may already have a good relationship with someone below the C-Suite, and this person could help you gain access to the company's most senior executives. If it's an ongoing client, you need to convince your client that meeting company leaders will support what you're doing together and be good for his visibility.
6. **Show how you can help with a key priority.** When you can't get a meeting with certain executives, it's usually because they don't see you as being relevant to their needs at that point in time. Identify something unique or unusual that you can offer the executive you're trying to access, focused around one of their interests or priorities. This could be some powerful new market data, a new piece of research, a set of interview findings, knowledge you've developed about their customers, and so on.
7. **Build a non-commercial relationship first.** Executives do business with people they like and trust, and there are many non-commercial avenues at which to get to know them before you try and pitch your services. For example, get them to participate in a research study, invite them to speak at a conference, or perhaps make their acquaintance through a non-profit organization.
8. **Create a tailored event.** It could feature a well-known speaker or famous academic, for example, who you know will appeal to their particular interests. Invite a small group of executives, not just one.
9. **Get one of your firm's leaders to set up a meeting.** Some clients are very hierarchal, and you may need to engage your own CEO to get into their C-Suite. Be careful of your expectations of these types of "summit" meetings, however. A lot of pleasantries get exchanged, but often little else is accomplished.
10. **Do something dramatic.** One of my clients wanted to work for a CEO whose favorite bourbon brand was Wild Turkey. They had an associate dress up in a turkey costume and run up and down the lawn in front of his office at their corporate headquarters in Dallas, Texas. They did in fact get a meeting, and he became a client. This is an over-the-top example that few should try. But when all else fails, you might consider a direct, bold appeal to the executive.

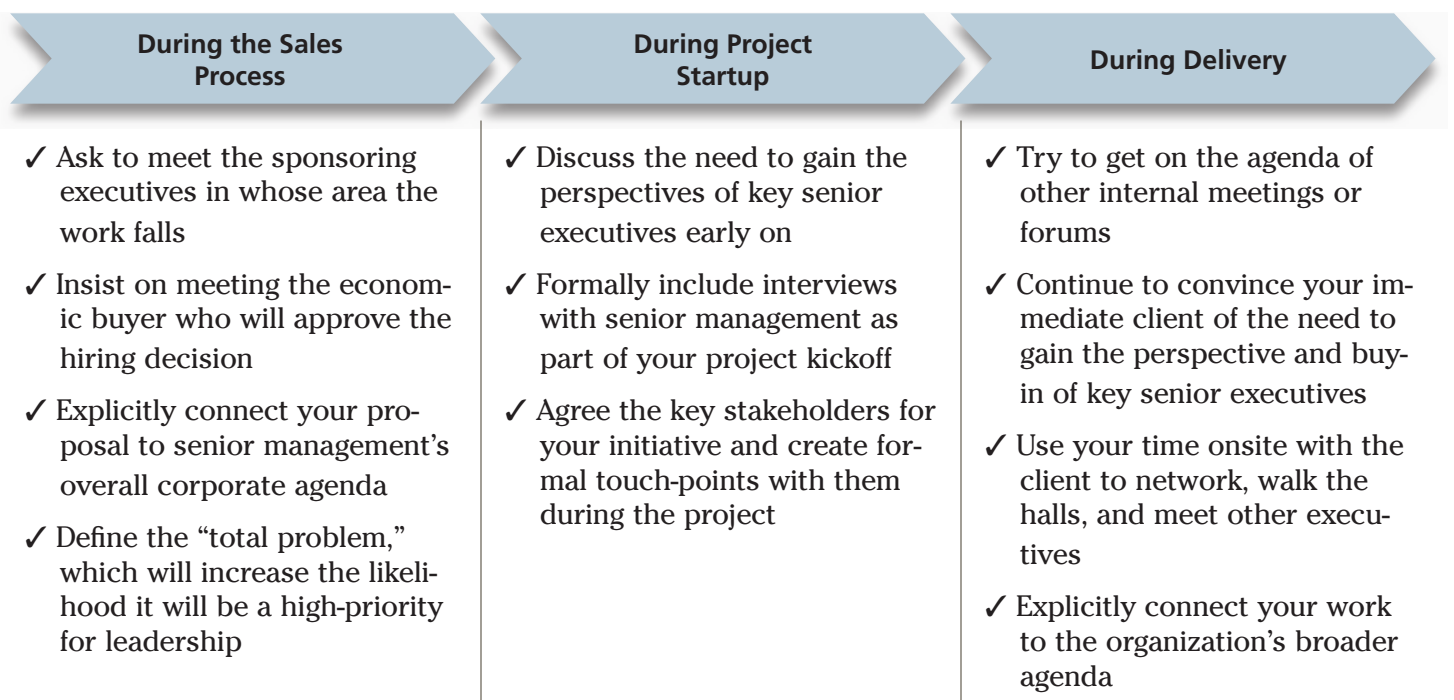
The fallback strategy for getting a meeting with a senior executive is to write or call and give some plausible reason for getting together. The problem with that strategy is this: there are hundreds of other people doing the exact same thing. And remember—if they don't know you already or if you haven't been recommended by a friend or colleague—they are unlikely to respond. So if you do write a letter, it really has to say or offer something compelling that directly aligns with a key problem or opportunity that executive faces.

Moving up inside an existing client

When you are stuck at the middle-management level, it's often because that's where you entered the organization. Unfortunately, it's much harder to move up than to be referred downwards to a middle manager by a senior executive. Some companies grant significant budgetary authority to middle managers, however, and this may have been your natural route into the organization. There's nothing at all wrong with having your work funded by mid-level managers who have the confidence of their leadership. Over time, though, you should be cultivating relationships with more senior individuals as well.

Think about connecting at the top as an ongoing effort that spans the entire sales and client development lifecycle. The graphic, below, shows how to do this.

Moving up in the Organization



As you can see, you have opportunities to connect with senior management during every stage of the relationship-building process.

Sometimes, the barrier to connecting with senior management is your immediate client. He may feel threatened that if you go over his head he will lose control of the project and also lose power as your singular client. You need to convince him that it is in his interests to connect what you're doing with senior management, and that it will enhance both the chances for success and his own reputation.

You probably have in mind the names of a few senior executives whom you'd like to gain access to. Use Exercise Four to identify your best strategies for doing so.

EXERCISE FOUR:

Pick two senior executives to whom you'd like to get access. One should be a current client; the second one should be a prospect. Write their names across the top of the worksheet on the next page. Check off the highest-potential access strategies that you think might work for you. For each one you choose, write down a specific action step.

WORKSHEET FOUR Gaining Access

Executive Name		
<i>Access Strategy</i>	<i>High Priority?</i>	<i>Next Step?</i>
Long-Term Access Strategies		
1. Follow the person, not the position	<input type="checkbox"/>	
2. Build your brand	<input type="checkbox"/>	
3. Publish and speak	<input type="checkbox"/>	
Short-Term Tactics		
4. Gain a peer introduction	<input type="checkbox"/>	
5. Work through a more junior executive	<input type="checkbox"/>	
6. Show how you can help with a key priority	<input type="checkbox"/>	
7. Build a non-commercial relationship first	<input type="checkbox"/>	
8. Create a tailored event	<input type="checkbox"/>	
9. Get one of your firm's leaders to set up a meeting	<input type="checkbox"/>	
10. Do something dramatic	<input type="checkbox"/>	
11. Write or call them	<input type="checkbox"/>	
12. Other _____	<input type="checkbox"/>	



BREAKING THROUGH IN THE FIRST MEETING

Leave them wanting more

We've looked at a number of strategies for gaining access to C-Suite executives. Now, you have to prepare for your first meeting. This is a make-or-break event. Here's why:

It's not uncommon to get a first meeting with a top executive,

As hard as it is to get a first meeting with a C-Suite executive, it's even harder to get a second meeting.

and then find it very difficult to get back for a second one and build a real relationship. So you have to make the first one count. Remember, your basic objectives are not different from any other first meeting with a prospective client.

Your *overall* goal is to begin developing a relationship of trust where you are perceived as someone who can add value to the most important issues that individual faces.

Missing the Mark

A major technology company tried for months to get a meeting with the CEO of a prospective client, a large corporation. Based on a superficial reading of their strategy, they prepared a pitch. They finally got the meeting, which was scheduled for one hour. Fifteen minutes into it, the CEO—obviously distracted—excused himself, got up, and left. The next day, the team found a video interview with the CEO on the Web. In it, he discussed his new strategy, which rendered the pitch they had made virtually irrelevant.

Specifically, you must:

1. Build rapport
2. Establish your credibility
3. Understand their agenda—their priorities and goals
4. Get a next step

As you work goal number 3, you may identify a specific need and develop it during the conversation.

These are your basic minimum objectives. As you accomplish them, remember to:

- Show, not tell. Give examples rather than cite your and your colleagues' resumes.
- Ask thought-provoking questions.
- Have a conversation, not show how smart you are.

Earlier, we talked about the expert versus the advisor mindset. The following table illustrates how differently you approach these first-meeting goals depending on which mindset is driving your behavior:

Your Mindset Drives Your Behavior in First Meetings

Goal	Experts tend to:	Advisors tend to:
Build rapport	Downgrade its importance and/or skip it entirely	Connect authentically around real commonalities and similarities
Establish your credibility	TELL: They talk about their methodology and their deep expertise	SHOW: They use client examples to illustrate their work and ask credibility-building questions
Understand the client's agenda	Accept the client's definition of the problem, and move quickly to their own proposed solution	Come prepared with a strong understanding of the client's business, ask thoughtful questions to tease out the client's real agenda, and possibly even challenge the agenda
Get a next step	Assume that if the client is interested, he or she will let them know	Use the last ten minutes of the meeting to carefully transition to a possible next step, and work to evoke the client's curiosity



Here are some typical pitfalls you should avoid when you meet with C-Suite executives:

Typical first meeting pitfalls—don't:

1. **Walk in as a supplicant or be nervous.** How could an executive accept you as a peer or potential advisor if you're sycophantic and nervous?
2. **Overreach and try to accomplish too much.** This often happens if you work for a firm. When people discover you have a top-level meeting, they load all of their requests and baggage onto you. Pretty soon you have ten things you're supposed to accomplish in a 45-minute meeting!
3. **Try and sell something.** Top executives want to buy, not be sold to. As soon as they sense you are trying to sell them something or get immediate business, they will switch off and stop listening.
4. **Work your agenda.** In this first meeting, it's all about their agenda, not yours.
5. **Exaggerate or use hyperbolic language.** You will be less, not more, believable.
6. **Take too long to get to the point.** Clients at this level are used to digesting information in small chunks, and doing it rapidly.
7. **Overly control the conversation.** C-Suite executives are not used to being "guided" through their conversations. Try to keep the discussion on track, but give them a wide berth.

8. **Walk through a presentation or brochure.** You'll bore them and come across as a technical resource not a potential trusted advisor.
9. **Bring your laptop computer and a huge briefcase stuffed with files and papers.** Save all that for your meetings with your own team. Most top executive conversations can be facilitated with nothing more than a pad of paper (perhaps in a leather portfolio), a pen, and a one-page outline.

Essential planning for your meeting

When I was growing up, I often heard this expression from my father:

“There is no substitute for genuine lack of preparation.”

It's both funny and true. True lack of preparation can create the worst kinds of disasters. Even in his 90s, he is still a very meticulous man who does not approach any task haphazardly.

Here are some questions you need to answer before you go to meet with a senior client executive:

1. Have you discussed the meeting agenda with your client, and discovered what in particular they would like to cover?
2. Do you know who will attend from the client's side? I once walked into what I thought was a one-on-one meeting with a senior vice president, and there were ten people waiting for me around a conference table! You don't want to be surprised (or ambushed!). Also, don't create the opposite problem: never bring more than one more person than the client will have present.
3. If others are attending from your firm, have you agreed what your roles are going to be? Be careful to avoid the “pig-pile” phenomenon, where the client asks a question, and then everyone in your group feels compelled to answer it or give their own particular slant on the issue. Everyone

The Limits of the First Meeting

“The truth is that you cannot actually develop trust in the very first meeting. What you *can* do is to get a sense for whether or not the other person is someone in whom you *could* develop trust over time. Do they ask thoughtful questions and listen well? Are they asking for business *today*—or showing they are willing to invest in getting to know our business and build a relationship in the future? If they bring one or more colleagues, how do they get along together? This gives me a hint about what a long-term relationship with them *might* be like.”

Chief Financial Officer

on your team will be talking so much that the client won't get a word in edgewise!

4. Have you thoroughly researched the company and the individual you're meeting with? This is an awfully basic task, but you'd be surprised how many top executives tell me that people frequently come to meet with them knowing very little if anything at all about their business.
5. Have you developed some understanding about what this client's priorities and goals are right now? Ideally this is a phone conversation, but you could have an email exchange or work with a direct report to craft the agenda.
6. What are the three or four thought-provoking questions you'd like to ask your prospect?
7. What client examples have you prepared that will be relevant to this executive? Brief (50-70 word) client examples are far more interesting and powerful than brochures or lists of offices around the world!
8. Do you have a “point of view” to share about the prospect's industry or the trends that are affecting their organization? Inquiry-only based sales is dead. You need to add value, not just ask a list of questions!
9. Are you potentially trying to accomplish too much in this first meeting, perhaps in response to pressures from colleagues or your firm's leadership? Or have you set just a few critical objectives—e.g., build trust and rapport, understand their issues, establish your credibility, and get a next step?

Act like a peer from the outset

To become a client's trusted advisor, you must be viewed as a peer in three areas: *professional acumen*, *behavior*, and *values*. Think of these as complementing the eight attributes you read about in Chapter 3.

In your very first meeting with an executive, you must at least provide hints that you have the requisite professional acumen. And, you must display the behavior and values that a top executive expects from her inner-circle advisors.

Do You Have the Necessary Self-Confidence?

A top CEO headhunter told me once about a candidate for a senior job that he had all but turned down just by spying him in the reception area of his Manhattan offices. He said, “The candidate had only been there for a few minutes, and he was sitting quietly on the couch. That told me right away that he probably didn’t have the C-Suite mindset—the confidence needed to operate at the level the job required. CEO candidates don’t sit and wait—they stand. That way, when you walk in to pick them up and take them back to your office, they are not in an inferior or supplicant position. Most of them do this without even thinking about it. When I walk out and they are standing, the relationship starts on a peer level.” Trivial? Not at all. Clients look at these subtle behavioral clues and make judgments very rapidly.

The five qualities of professional acumen

Acumen is, literally, “the ability to make good judgments and make quick decisions.” Clients want a peer who can partner with them to solve their toughest problems, capture opportunities, and achieve their goals. Professional acumen has five qualities:

1. **Experience:** Your clients need reassurance that you’ve addressed this same issue many times before, most likely in their specific industry and/or function.

Can you frame your experience in a compelling and relevant way?

2. **Expertise:** Top executives want to know if you are truly an expert in your field.

Do you focus on your expertise and methodologies too early in your client conversations? Can you show, at the right moment, how it applies to your client’s most critical issues?

3. **Knowledge Breadth:** Senior executives in particular will look for a peer advisor who has in-depth expertise AND knowledge breadth. They want someone who understands the interrelationships between different parts of their business—someone who has an *enterprise-wide perspective*. (This is the “Deep Generalist” attribute described in Chapter 3.)

In addition to talking about the specific problem that your clients have, are you able to have broad-based conversations with them about their business issues?

4. **Judgment:** Clients face more strategic and operational choices than ever before. You establish yourself as a peer when you demonstrate your ability to discern between different courses of action and help your clients make tough decisions

Do you feel there is a precise, correct solution that always applies to a particular situation, or does your client’s culture and values—and your own—inform you decision making?

5. **Insight.** Insight means having a strong sense of perception. That is, seeing issues clearly and being able to separate the wheat from the chaff.

All five of these qualities add up to the intellectual strength—

the professional acumen—that senior clients look for in a peer relationship with an outside advisor or service provider.

The second area where you can show you are a peer is your *behavior*.

Here are four of the behaviors you need to manifest if you want to establish senior-level, peer-client relationships:

1. **A willingness to challenge your clients.** This recalls the attribute of “selfless independence.” A division president at a major bank once told me, “I divide all the advisors I use into two groups: Those who simply do what I say, and those who will push back and sometimes say ‘No.’ A few of these latter individuals are my trusted advisors. The others are really suppliers.”
2. **An attitude that establishes equality.** If you keep thanking your clients, over and over again, for “taking so much of their valuable time to meet with you,” what does that convey? Better would be, “I’m delighted we were able to meet today. Thank you.”
3. **Confident body language.** A CEO once told me, “If you walk into a client’s office with your head held high, there’s always the chance that you’ll get knocked down a notch. That’s a small risk. But if you go in on your knees, no client will ever, ever lift you up.” If your body language betrays anything less than a belief that you belong in the room with that executive, it’s unlikely you’ll be viewed as a peer.
4. **Showing courage.** Do you fold your tent at the slightest provocation, or do you hold your ground?

Finally, you have to *believe* you belong in your top client’s corner office. You must possess a strong sense of your own value and your ability to help your clients improve and grow their businesses. That deep belief in yourself and what you have to offer will go very far towards creating the peer relationship you desire.

EXERCISE FIVE:

Two copies of the Executive First Meeting Checklist are printed on the following pages. Use the first one to review a meeting you recently had with a prospective client. Use the second one to plan an upcoming meeting you have scheduled.

WORKSHEET FIVE

Executive First Meeting Checklist (Recently Held Meeting)

Holding Great Senior Executive Meetings	Pre-Meeting Planning	Post Meeting Review
Client name:		
<i>PRE MEETING</i>		
Discussed or corresponded about desired agenda	<input type="checkbox"/>	
Ascertained who will be there	<input type="checkbox"/>	
Clarified colleagues' roles for the meeting	<input type="checkbox"/>	
Developed meaningful "point of view" to share	<input type="checkbox"/>	
Selected two to three relevant client examples to talk about	<input type="checkbox"/>	
Researched company and executives	<input type="checkbox"/>	
Developed three to five thoughtful questions	<input type="checkbox"/>	
Held pre-meeting planning session	<input type="checkbox"/>	
<i>MEETING</i>		
Develop Rapport and Set the Agenda		
Used small talk as icebreaker		<input type="checkbox"/>
Asked thoughtful, respectful personal questions		<input type="checkbox"/>
Confirmed/re-set agenda and timing		<input type="checkbox"/>

Build Your Credibility		
Able to effectively describe what is special about you/your firm		<input type="checkbox"/>
Used brief, relevant client examples (50-75 words)		<input type="checkbox"/>
Shared points of view on markets, competition, etc.		<input type="checkbox"/>
Asked thoughtful questions about key issues facing client		<input type="checkbox"/>
Had open, candid, authentic demeanor		<input type="checkbox"/>
Had a conversation instead of making a presentation		<input type="checkbox"/>
Uncover Client Needs and Issues		
Asked about impact of trends and current events		<input type="checkbox"/>
Highlighted issues that your other clients face		<input type="checkbox"/>
Asked intelligent questions based on your research about their strategy, operations, and organization		<input type="checkbox"/>
Asked agenda-setting and aspirational questions		<input type="checkbox"/>
Ascertained urgency and payoff of the issue		<input type="checkbox"/>
Confirmed client is economic buyer and “owns” the issue		<input type="checkbox"/>
Get a Next Step		
Evoked client’s curiosity to learn more		<input type="checkbox"/>
Added “value for time” during the meeting		<input type="checkbox"/>
Identified a value-added follow-up step for you		<input type="checkbox"/>
Secured an action commitment from them as well		<input type="checkbox"/>
POST MEETING		
Noted follow-up steps, summarized key points for client		<input type="checkbox"/>
Debriefed with team and discussed what you learned		<input type="checkbox"/>
Acted rapidly on follow-up		<input type="checkbox"/>

WORKSHEET FIVE

Executive First Meeting Checklist (Upcoming Meeting)

Holding Great Senior Executive Meetings	Pre-Meeting Planning	Post Meeting Review
Client name:		
<i>PRE MEETING</i>		
Discussed or corresponded about desired agenda	<input type="checkbox"/>	
Ascertained who will be there	<input type="checkbox"/>	
Clarified colleagues' roles for the meeting	<input type="checkbox"/>	
Developed meaningful "point of view" to share	<input type="checkbox"/>	
Selected two to three relevant client examples to talk about	<input type="checkbox"/>	
Researched company and executives	<input type="checkbox"/>	
Developed three to five thoughtful questions	<input type="checkbox"/>	
Held pre-meeting planning session	<input type="checkbox"/>	
<i>MEETING</i>		
Develop Rapport and Set the Agenda		
Used small talk as icebreaker		<input type="checkbox"/>
Asked thoughtful, respectful personal questions		<input type="checkbox"/>
Confirmed/re-set agenda and timing		<input type="checkbox"/>

Build Your Credibility		
Able to effectively describe what is special about you/your firm		<input type="checkbox"/>
Used brief, relevant client examples (50-75 words)		<input type="checkbox"/>
Shared points of view on markets, competition, etc.		<input type="checkbox"/>
Asked thoughtful questions about key issues facing client		<input type="checkbox"/>
Had open, candid, authentic demeanor		<input type="checkbox"/>
Had a conversation instead of making a presentation		<input type="checkbox"/>
Uncover Client Needs and Issues		
Asked about impact of trends and current events		<input type="checkbox"/>
Highlighted issues that your other clients face		<input type="checkbox"/>
Asked intelligent questions based on your research about their strategy, operations, and organization		<input type="checkbox"/>
Asked agenda-setting and aspirational questions		<input type="checkbox"/>
Ascertained urgency and payoff of the issue		<input type="checkbox"/>
Confirmed client is economic buyer and “owns” the issue		<input type="checkbox"/>
Get a Next Step		
Evoked client's curiosity to learn more		<input type="checkbox"/>
Added “value for time” during the meeting		<input type="checkbox"/>
Identified a value-added follow-up step for you		<input type="checkbox"/>
Secured an action commitment from them as well		<input type="checkbox"/>
POST MEETING		
Noted follow-up steps, summarized key points for client		<input type="checkbox"/>
Debriefed with team and discussed what you learned		<input type="checkbox"/>
Acted rapidly on follow-up		<input type="checkbox"/>



BUILDING AN ONGOING RELATIONSHIP

Adding value for time

Mid-level managers seek *value for money* when it comes to hiring external providers. In contrast, C-Suite executives are focused first on *value for time*. They also want value for money, but you will never successfully build a relationship with them if you don't add value for time in your meetings.

Think about it: Most top executives could fill their days three times over with people who want to meet with them. Why should they make time for you? There must be a compelling reason for them to spend part of their hyper-busy day with you.

Here are ways you can add value for time in the C-Suite:

- **Align to their agenda.** What are the four or five most important issues or goals right now? If what you have to say doesn't connect to this agenda, you'll be pushing water uphill. Also try to understand what's important *right now*. Short-term pressures and events often hijack executives' long-term agenda. You might ask, "What's the most important thing we should be discussing today?" or "What's the most valuable way for us to spend this time?"
- **Provide insight about the external world.** Are you offering valuable (and interesting) information and insights about trends, customers, markets, competitors, the economy, or government policies?

“If you can give an executive ten minutes back because you finish the meeting early, no one is going to mind. In fact, they’ll respect you and be grateful that you’ve used their time well.”

–Sir Win Bischoff,
Chairman, Lloyds
Banking Group

- **Provide insight about the internal organization.** Can you enlarge their perspectives based on your intimate familiarity with their organization and people? Are you able to say, “We’ve been working with your people now for a year, and we’d like to share some observations about the organization with you...”
- **Have a point of view.** Senior executives respect and are drawn to professionals who have a point of view and a well-thought-out perspective on the issues. Blandness is not memorable. Be willing to take a stand. If by some chance you are proven wrong three years later, that fact will be less important than your demonstration of character and conviction.
- **Like a great pop song, have an opening hook.** You only have a few minutes to grab their attention and get them interested in continuing the dialogue. Think of the Beatle’s song “Help” that begins with a great shout, or the Rolling Stone’s “Satisfaction” that begins with Keith Richard’s thumping guitar—they command you to listen.
- **Add value in different dimensions.** Do you have an idea for them to consider? Can you suggest a valuable introduction to expand their network? Can you help on a personal level in some way? Can you suggest ways for their team to be more effective? Can you review a plan or proposal for them?
- **Be willing to say “no” and challenge them.** In the words of one CEO, “Internally, it’s hard to find trusted advisors who will really challenge me.” Be seen as someone who is willing to say *no* even when it’s in your financial interest to say “yes.”
- **Show them that you use their time effectively.** Don’t confuse quantity of time with quality. If you can help them get more out of their day, or finish a conversation in 45 minutes that others take an hour for, you’ll make an impression.

Adding value for time is the secret to building an ongoing relationship with C-Suite executives, because it leaves them wanting more. They will walk away from a discussion with you thinking, “That was interesting...I learned something.”

Developing an ongoing relationship

You have to be very intentional about building an executive relationship once you have established contact. You may only rarely have the opportunity or excuse to get in front of the CEO or CFO of a company, whereas with your day-to-day clients it's more natural to talk each week or each month.

Every relationship is somewhat different—there's no magical, five-step formula for building a deep, trusted relationship with a C-Suite executive. Here are some tips for following up with your senior clients over time, especially ones who you don't see regularly:

- Always be thinking about how you can add value on an ongoing basis. Make sure you understand your client's agenda of major priorities and goals for the year, so that you can stay in touch in ways that are meaningful to them.
- Send the occasional, well-chosen article or book (perhaps a piece that you have written) and explain, in just one or two lines, why it is relevant to them and what they may learn from it
- Offer to make an introduction with another senior-level client of yours.
- Interview them as part of a research program.
- Try and get them involved in the initiatives you are working on for the client. For example, for one project I asked if I could interview my client's CEO and videotape it, for use later on during some workshops I was teaching with their managers.
- If you have an idea or some observations about the executive's organization, invest some time to develop them and share them. Ideally, get a face-to-face meeting—perhaps over coffee, which is less onerous than lunch or dinner. If you can't get an in-person meeting, send them a short, pithy letter.

What about your own senior client meetings? Do you think you can do a better job of adding value for time? Use Exercise Six to help you think about how to apply these ideas to your next meeting.

EXERCISE SIX:

Think about an upcoming meeting you have with a senior level prospect or existing client. Use the following worksheet to identify how you are going to add “value for time” during the discussion.

WORKSHEET SIX

Adding Value for Time

Value-for-Time Strategy	Possible Content for Your Discussion
Client Name: _____	
1. Align your message to their agenda	
2. Provide external insight (Markets, customers, trends, best practices, etc.)	
3. Provide internal insight (Observations about the organization, insights about operations, etc.)	
4. Have a clear point of view (About the industry, key trends, functional excellence, etc.)	
5. Have an opening hook (What is your message?)	
6. Add value in multiple dimensions (For example, can you help them redefine the problem? Can you make a suggestion about their top team, etc.?)	
7. Challenge them (What assumption or belief can you potentially challenge?)	
8. Use their time effectively	
9. Other _____	
10. Other _____	



7

POWER QUESTIONS FOR THE C-SUITE

Often, the questions are more important than the answers

Several years ago, I was sitting comfortably in a sun-filled office on the 40th floor of a Chicago skyscraper. I was with a CEO who ran a \$12 billion company, and I was interviewing him about his most trusted business relationships. I asked the CEO, “What most impresses you when you meet someone who is trying to win your business? What builds trust and credibility with you early on in a relationship?”

“I can always tell,” he said, “how experienced and insightful a prospective consultant, banker, or lawyer is by the quality of their *questions*.”

In a very direct statement, this CEO told me what hundreds of others I’ve advised and interviewed have also affirmed: *Good questions are often far more powerful than answers.*

Good questions challenge your thinking. They reframe and redefine the problem. They throw cold water on our most dearly held assumptions. They force us out of our traditional thinking. They motivate us to learn and discover more. They remind us of what is most important in our lives.

Here are some questions, organized around nine conversational challenges that will be helpful in your meetings with C-Suite executives:

“You can tell if a man is clever by his answers, you can tell if a man is wise by his questions.”

—*Naguib Mafouz*,
1988 Nobel Prize
winner for literature

1. **Uncover their agenda:**

- I’m familiar with the broad outlines of your strategy. What major programs are you emphasizing this year in support of it?
- Going forward, what additional capabilities do you need to put into place to support your strategy?
- Where will your future growth come from?
- As you think about the future of your business, what are you most excited about? Concerned about?
- Deciding to do X was a bold move. I’m curious about some of the choices you made. Can you share with me why you ...?
- What are your major priorities this year?
- Why do you want to do that?
- Why do you think that’s happening?
- Why did you decide to do it that way?
- What do you think is getting in the way of accomplishing that?
- What business goal is driving this?

2. **Challenge them:**

- How did you arrive at 10% as a target?
- Do you feel that’s sufficiently/overly ambitious?

3. **Ask about implementation:**

- How would you assess your progress in creating a more client-centric culture?
- What do you feel you’ve accomplished, and where are you lagging?”

4. **Bring in internal insight:**

- In working with your people over the last six months, we’ve observed a tendency towards risk avoidance, leading to slow decision making. Does that square with your own view?
- People are having a hard time making timely decisions. What do you think is getting in the way?

5. Ask about the external environment:

- Why do you think (competitor X) has grown so rapidly in that market?
- Some of your competitors have created virtual customer communities. Do you have any initiatives in this area?

6. Help redefine the problem:

- In my experience, changing the organization's structure won't have the impact on collaboration unless you also address things like your measurement-and-reward system and your decision-making process. What do you think is really at the heart of the lack of teamwork?

7. Ask about organizational effectiveness:

- How do you feel about the dynamics within your senior team?
- As you think about your senior team, what skills or capabilities do you wish you had more of?
- What do you think is holding people back from accomplishing this?

8. Learn more about their thinking:

- What do you think your options are to... (grow your European business...reduce your customer acquisition costs...improve your share of wallet...etc.)?

9. Understand what makes them tick:

- What was your most important developmental experience in becoming a leader?
- Have you ever experienced a setback in your career? How did it affect you?

When using questions with top executives, remember these pointers:

- When you want to draw the other person out, turn your statements into questions. Rather than saying, "I think you have a customer-service problem" ask "How do you feel about your customer-service levels?"
- Use questions to stimulate a conversation—a two-way exchange. Don't overwhelm the other person by asking too many questions.

- Ask questions that access emotions not just analysis. “As you look at the growth of your business over the next couple of years, what are you personally most excited about?”
- Be bold. Everyone can improve the quality and incisiveness of their questions.



BECOMING A PERSON OF INTEREST

The ultimate attraction strategy

As we've seen, it's not easy getting time scheduled with company leaders. They are incredibly busy. Everyone wants to meet with them.

What if it were the other way around? What if these executives were seeking you out? What if, when you called, they were not just happy to make time for you, but they looked forward to having you come and see them?

The secret to making this happen is to become a *person of interest* to top executives. Of course, I'm not using the law enforcement definition of "Person of Interest," which in a police investigation is someone who is subject of interest but who has not been charged or accused of any crime. Rather, I'm talking about someone to whom top executives are drawn and with whom they want to spend time.

Senior executives will view you as a person of interest based on their perception of *what* you know, *who* you know, and what you *are*—the values, ethics, and beliefs that motivate you.

Here are six strategies to help you become a person of interest to senior executives:

C-Suite executives want to know:

WHO you know,
WHAT you know,
and WHAT you are.

1. **Develop your knowledge breadth.** We've already discussed this concept of the "Deep Generalist." Deep generalists build knowledge in multiple arenas. For example:
 - In their core, professional specialty.
 - About their clients as people, their businesses and organizations, and the industries/competitive landscapes in which they operate.
 - About the business "ecosystem" that surrounds their clients.
 - And also, deep generalists develop their personal interests, which I'll talk about in a moment.

To build your knowledge breadth, you have to read widely. Broadening your knowledge is important because narrow specialists tend to be fleeting objects of interest. Executives want to speak to them to get a specific answer, but the people they spend more time with are usually broader in their knowledge.

2. **Develop your thought leadership.** You can develop your thought leadership in three ways: First, as an *innovator* who comes up with truly new ideas and approaches; second, as a *synthesizer* who builds on existing ideas or an existing body of knowledge; and third, as a *master*, a craftsman who excels at his or her work and builds a reputation for excellence. A good starting point is to draw out some explicit principles or best practices from your own experiences to make your implicit knowledge explicit for clients in bite-sized pieces.
3. **Be seen as someone who is at the crossroads of the marketplace.** You achieve this by getting out and talking to lots of people in your field and reading widely around your specialty. If clients see you as being in the flow of things, as having the latest information about companies, executive careers, trends, and so on, they will always make time to see you.
4. **Cultivate your own interests.** In my experience, many successful senior executives attack their work and personal lives with equal gusto and intensity. They enjoy their hobbies and personal interests as much as their professional careers. And, they like to hang out with people who have

their own pursuits. This is not something you can do overnight. But you really should think about what you're going to talk about with a CEO over lunch, because much of the conversation will not end up being about business.

Is there an interest you have that you wish you had time to pursue? Why not start this year? What's holding you back?

5. **Build an eclectic network.** As I said, a person of interest knows interesting things and *associates* with interesting people. Have you stuck with the same circle of friends and acquaintances over the last ten or fifteen years? Or have you been open to welcoming new people into your circle. Do you gravitate towards people who are like you, or are you able to spark a relationship with individuals who are quite different and come from different backgrounds?
6. **Use deliberate practice techniques to improve your skills.** Senior executives gravitate towards people who are at the top of their professions, and you get that level of skill through what is called *deliberate practice*.

For example, we go to a lot of client meetings, but how often do we actually break down the specific performance elements that go into a great meeting and rehearse them and perfect them?

There are three principal characteristics of deliberate practice.

1. *Isolation.* Great performers isolate very specific aspects of what they do and practice them until they are improved. Think of a tennis champion practicing a particular type of serve, again and again. Or the musician who practices the same difficult passage 20 times in order to master it.
2. *Repetition.* A high degree of repetition is essential to improve each aspect of performance. It's not uncommon for master practitioners to repeat the same steps or movements hundreds and thousands of times in order to raise their skill.
3. *Feedback.* The need for objective feedback is the reason musicians have teachers, athletes have coaches, and professionals have mentors. Think back to that tennis champion practicing the same serve over and over. Most

What can you do, this year, to put yourself more firmly at the crossroads of the markets you work in?

“I wish that all my advisors were independently wealthy. That’s because then I would know they were always telling me the truth, they would always be focused on my agenda, they would be truly objective about my issues. Making money from the relationship would never influence their advice.”

—*Chuck Lillis*,
former CEO of
Mediaone, a \$20 billion
cable company

likely this player is being videotaped, and the coach is watching closely to provide the objective feedback that the player cannot give him or herself.

The final secret: The Mindset of Independent Wealth

Cultivating what I call “The Mindset of Independent Wealth” is one of the most powerful things you can do to attract and keep clients. If you are successful at it, you’ll create a palpable aura around you that is enormously attractive not only to clients but to anyone with whom you have a business relationship.

Top executives want to work with external advisors who are emotionally centered, confident, love their work, and are always willing to put the client’s interests first. One of the best ways to develop these qualities is to carry around the “Mindset of Independent Wealth” with you. Think about having a Bill Gates, Warren Buffet, or Richard Branson as your business advisor. These are people who have no axe to grind. They are passionate about their work. They don’t need to do anything to make extra money off you, because they already have all they need.

There are three behaviors you need to exemplify in order to develop this mindset:

1. **Treat clients like peers.** Don’t be subservient or arrogant. Treat them like friends or colleagues, not demi-gods.
2. **Be present—completely in the moment.** Don’t think about your next meeting. Listen intently. Make the other person feel as though he or she is the only other person in the world at that moment.
3. **Exude enthusiasm.** When you demonstrate passion for your work, it is contagious. It gets the other person excited about what you are excited about.

If you exhibit these behaviors, clients will sense it across the room. You’ll build trust faster. It will be easier for them to think of you as a peer. You’ll have a head start in becoming a trusted advisor.

“An artist has to be careful to never think that he’s arrived somewhere. He has to be in a constant state of becoming.”

—*Bob Dylan*

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AUTHOR BIO AND CONTACT INFORMATION

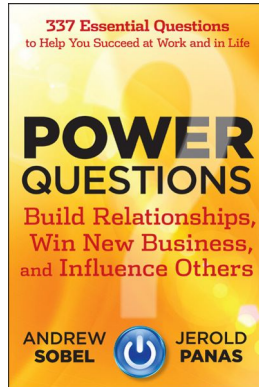


Andrew Sobel helps companies and individuals build clients for life. He is the most widely published author in the world on how to develop enduring business relationships. His bestselling books have been translated into ten languages and include *Power Questions*, *All for One*, *Making Rain*, and *Clients for Life*.

His clients include many of the world's leading companies such as Citigroup, Cognizant, Ernst & Young, Booz Allen Hamilton, Lloyds Banking Group, Bain & Company, and many others. Andrew's articles and work have appeared in publications such as the New York Times, USA Today, and the Harvard Business Review.

Andrew spent 15 years at Gemini Consulting where he was a Senior Vice President and Country Chief Executive Officer, and for the last 17 years he has led his own global consulting firm, Andrew Sobel Advisors. You can contact Andrew at <http://andrew-sobel.com> (email: andrew@andrewsobel.com)

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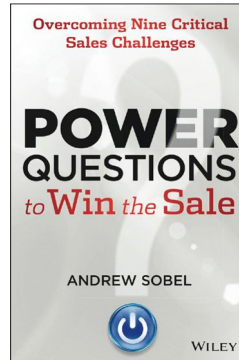
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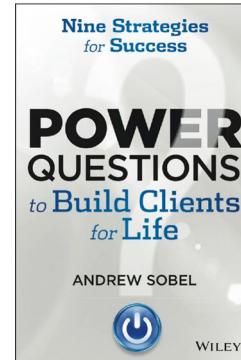


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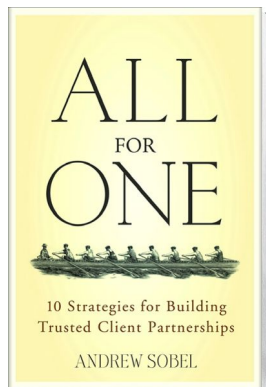


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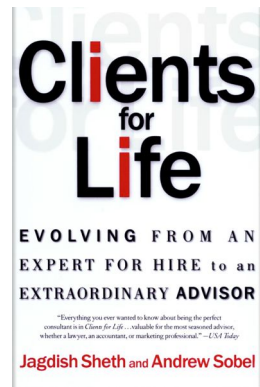


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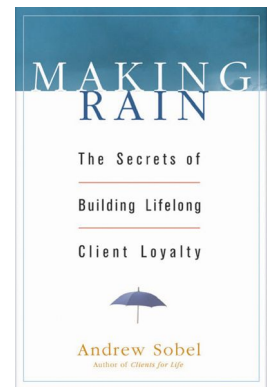


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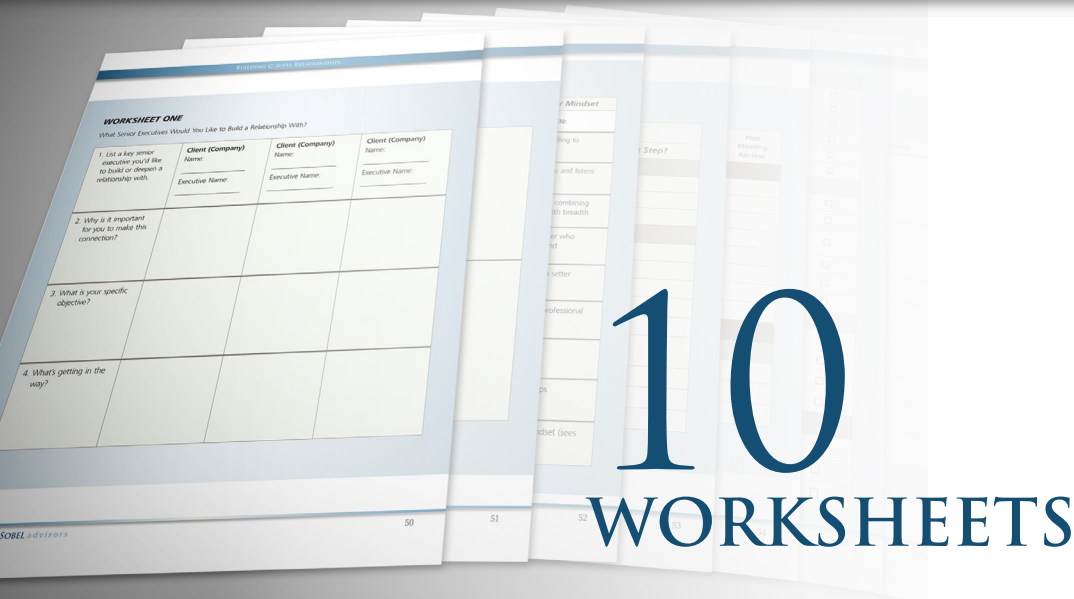
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All of the individual worksheets from Chapters 1 through 6 have been grouped here. If you wish, you can fill them out on the screen and then print them.

WORKSHEET ONE

Which Senior Executives Would You Like to Build a Relationship With?

<p>1. List a key senior executive you'd like to build or deepen a relationship with.</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>	<p>Client (Company) Name: _____ Executive Name: _____</p>
<p>2. Why is it important for you to make this connection?</p>			
<p>3. What is your specific objective?</p>			
<p>4. What's getting in the way?</p>			



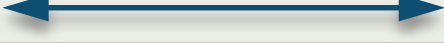





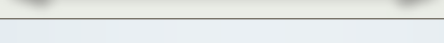
WORKSHEET TWO

C-Suite Concerns and Pressures

<p>1. What are the specific concerns of the top executives you know and work with?</p>	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p>
<p>2. How do your services address these concerns?</p>	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p>

WORKSHEET THREE

Do You Have the Expert Mindset or the Advisor Mindset?

<i>The Expert Mindset</i>		<i>The Advisor Mindset</i>
OFTEN:	Where would you place yourself on a continuum?	OFTEN:
Is for hire—says “Yes”		Is independent—willing to say “No”
Tells and gives answers		Asks good questions and listens
Is a specialist		Is a deep generalist, combining knowledge depth with breadth
Is good at analysis		Is a big picture thinker who is good at analysis and synthesis
Is reactive		Is a proactive agenda setter
Builds credibility		Builds personal and professional trust
Sells		Creates a buyer
Focuses on transactions		Focuses on relationships
Has a scarcity mindset (sees limitations and risks)		Has an abundance mindset (sees possibilities)

WORKSHEET FOUR
Gaining Access

Executive Name		
<i>Access Strategy</i>	<i>High Priority?</i>	<i>Next Step?</i>
Long-Term Access Strategies		
1. Follow the person, not the position	<input type="checkbox"/>	
2. Build your brand	<input type="checkbox"/>	
3. Publish and speak	<input type="checkbox"/>	
Short-Term Tactics		
4. Gain a peer introduction	<input type="checkbox"/>	
5. Work through a more junior executive	<input type="checkbox"/>	
6. Show how you can help with a key priority	<input type="checkbox"/>	
7. Build a non-commercial relationship first	<input type="checkbox"/>	
8. Create a tailored event	<input type="checkbox"/>	
9. Get one of your firm's leaders to set up a meeting	<input type="checkbox"/>	
10. Do something dramatic	<input type="checkbox"/>	
11. Write or call them	<input type="checkbox"/>	
12. Other_____	<input type="checkbox"/>	

WORKSHEET FIVE

Executive First Meeting Checklist (Upcoming Meeting)

Holding Great Senior Executive Meetings	Pre-Meeting Planning	Post Meeting Review
Client name:		
<i>PRE MEETING</i>		
Discussed or corresponded about desired agenda	<input type="checkbox"/>	
Ascertained who will be there	<input type="checkbox"/>	
Clarified colleagues' roles for the meeting	<input type="checkbox"/>	
Developed meaningful "point of view" to share	<input type="checkbox"/>	
Selected two to three relevant client examples to talk about	<input type="checkbox"/>	
Researched company and executives	<input type="checkbox"/>	
Developed three to five thoughtful questions	<input type="checkbox"/>	
Held pre-meeting planning session	<input type="checkbox"/>	
<i>MEETING</i>		
Develop Rapport and Set the Agenda		
Used small talk as icebreaker		<input type="checkbox"/>
Asked thoughtful, respectful personal questions		<input type="checkbox"/>
Confirmed/re-set agenda and timing		<input type="checkbox"/>

Build Your Credibility		
Able to effectively describe what is special about you/your firm		<input type="checkbox"/>
Used brief, relevant client examples (50-75 words)		<input type="checkbox"/>
Shared points of view on markets, competition, etc.		<input type="checkbox"/>
Asked thoughtful questions about key issues facing client		<input type="checkbox"/>
Had open, candid, authentic demeanor		<input type="checkbox"/>
Had a conversation instead of making a presentation		<input type="checkbox"/>
Uncover Client Needs and Issues		
Asked about impact of trends and current events		<input type="checkbox"/>
Highlighted issues that your other clients face		<input type="checkbox"/>
Asked intelligent questions based on your research about their strategy, operations, and organization		<input type="checkbox"/>
Asked agenda-setting and aspirational questions		<input type="checkbox"/>
Ascertained urgency and payoff of the issue		<input type="checkbox"/>
Confirmed client is economic buyer and "owns" the issue		<input type="checkbox"/>
Get a Next Step		
Evoked client's curiosity to learn more		<input type="checkbox"/>
Added "value for time" during the meeting		<input type="checkbox"/>
Identified a value-added follow-up step for you		<input type="checkbox"/>
Secured an action commitment from them as well		<input type="checkbox"/>
POST MEETING		
Noted follow-up steps, summarized key points for client		<input type="checkbox"/>
Debriefed with team and discussed what you learned		<input type="checkbox"/>
Acted rapidly on follow-up		<input type="checkbox"/>

WORKSHEET SIX

Adding Value for Time

Value-for-Time Strategy	Possible Content for Your Discussion
Client Name: _____	
1. Align your message to their agenda	
2. Provide external insight (Markets, customers, trends, best practices, etc.)	
3. Provide internal insight (Observations about the organization, insights about operations, etc.)	
4. Have a clear point of view (About the industry, key trends, functional excellence, etc.)	
5. Have an opening hook (What is your message?)	
6. Add value in multiple dimensions (For example, can you help them redefine the problem? Can you make a suggestion about their top team, etc.?)	
7. Challenge them (What assumption or belief can you potentially challenge?)	
8. Use their time effectively	
9. Other _____	
10. Other _____	

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