

## Developing Your Clients for Life: Best Practices Checklist

### Adding Value for Time

1. *Align to their agenda.* What are this executive's 4-5 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.
2. *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?
3. *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..."
4. *Understand what's important right now.* Short-term pressures and events often hijack an executive's 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?"
5. *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.
6. *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?
7. *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* when it's in your financial interest to say "yes."
8. *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.
9. *Help them 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 30 minutes that others take an hour for, you'll make an impression.
10. *Understand how they like to communicate.* Whether by memo, white paper, email, phone call, or in person—learn to be brief and direct.