

## Developing Your Clients for Life: Best Practices Checklist

### How to Become a Person of Interest to Senior Executives

1. *Make your implicit knowledge explicit.* For example: create short checklists to summarize what you've learned from your experiences — e.g., “The five most common pitfalls of cost cutting” or “Five things every leader should know about the economy” or “Seven strategies to restart growth” or “10 ways to immediately increase cash flow.” Your conversations will become richer as you are able to more systematically articulate what you know and the lessons you've learned over time.
2. *Become a better Deep Generalist.* A Deep Generalist has deep expertise in a specific subject matter as well as a breadth of knowledge that surrounds that core specialty—knowledge about their client as a person, the client's company and industry, and the general business environment in which the client operates. Deep Generalists can make knowledge connections that others cannot; and they are strong conversationalists in any circumstances.
3. *Resolve to significantly increase the amount of reading you do.* Think of different categories of books, articles, web resources, and other publications that you are interested in and which could impact your ability to converse with senior clients—e.g., content that explores:
  - General management
  - The industry and functions you work in
  - People: relationships, selection, development, and so on
  - History, biography and other types of non-fiction
  - Fiction
4. *Absorb what you read.* After you finish a book or particularly good article, write down the 3–5 key takeaways that you want to make sure you remember.
5. *Cultivate your own interests.* You won't be interesting to others if you have no interests outside of work. If you have dinner with a top executive or a thought leader, you're not going to talk very much about your latest methodologies or the project you're working on—rather, you'll discuss general business issues and your personal lives.
6. *Build relationships with individuals who are themselves persons of interest.* Senior executives are very focused on their networks, and you must be perceived as someone who knows other influential, well-connected individuals.
7. *Always have in mind the key issues and interests of others.* Be a source of insight and information for them on these, periodically sending interesting articles and ideas.