

## Developing Your Clients for Life: Best Practices Checklist

### Getting to Know Your Clients as People

1. *Follow your client's lead.* Move slowly and take small steps—some clients like to spend time getting acquainted on a personal level before doing business, others like to get right down to things. If someone is very private, *gradually* build familiarity.
2. *Be intensely curious.* Take a keen interest in other people and their lives. Ask questions—about their interests, their families, their aspirations, their vacations, their opinions, their views on current events, and so on.
3. *Cultivate your own interests.* Make time for hobbies and other interests outside of work and read widely so that you are interesting to others.
4. *Practice appropriate self-disclosure.* You have to be willing to talk about yourself and reveal things about your own life if you expect clients to open up (just don't talk *too* much or get too personal, too soon!)
5. *Look for similarities and commonalities and use them to connect.* Connect with clients around common interests, family, mutual acquaintances, life's concerns and challenges, social issues, politics, and so on. Look for what you have in common, not how you are so different.
6. *Invest in face time to build familiarity.* Particularly at the beginning of a relationship, it's important to build up a reservoir of face-to-face interactions. Familiarity leads to likeability and trust.
7. *Be human and accessible.* Show confidence tempered by humility (“I’m confident this is the right step for you. It’s worked well with other clients. But only you can decide if it’s right...”). Admit that you may have been wrong in your opinion about something or someone.
8. *Ask for advice.* People like to help others and they feel good about doing so. Advice could be both professional—e.g., asking a client’s input on an article you have drafted—and personal.
9. *Look for “breakthrough” moments.* What will be a real test of fire for your client? An upcoming board meeting? An executive offsite? A major speech? Be there for the big moment. Invest to support your client. Also, remember that conflict or a crisis—if handled properly—can lift the relationship to the next level.
10. *Use humor.* Humor is a universal way of connecting to others and diffusing tensions. Make fun of the crazy situations you find yourselves in. Make fun of yourself and your own foibles.
11. *Change the “relationship environment.”* Get out of the office, even if it’s to a coffee shop down the street. A different physical environment will change the quality and tenor of your interactions.