

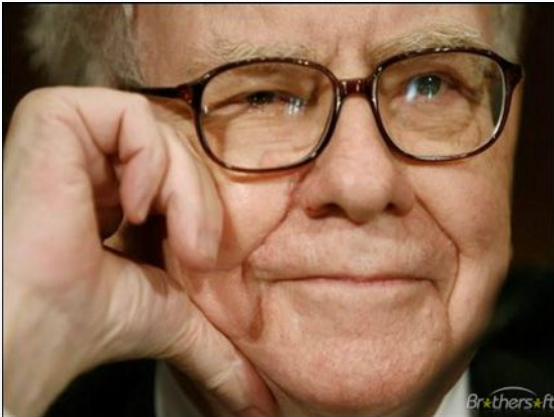
# Creating Client Impact

## Developing Trusted Client Partnerships

**ZS Associates Global Meeting**  
**August 7, 2014**

*Andrew Sobel Advisors*

# Are you saying “yes” to everything?



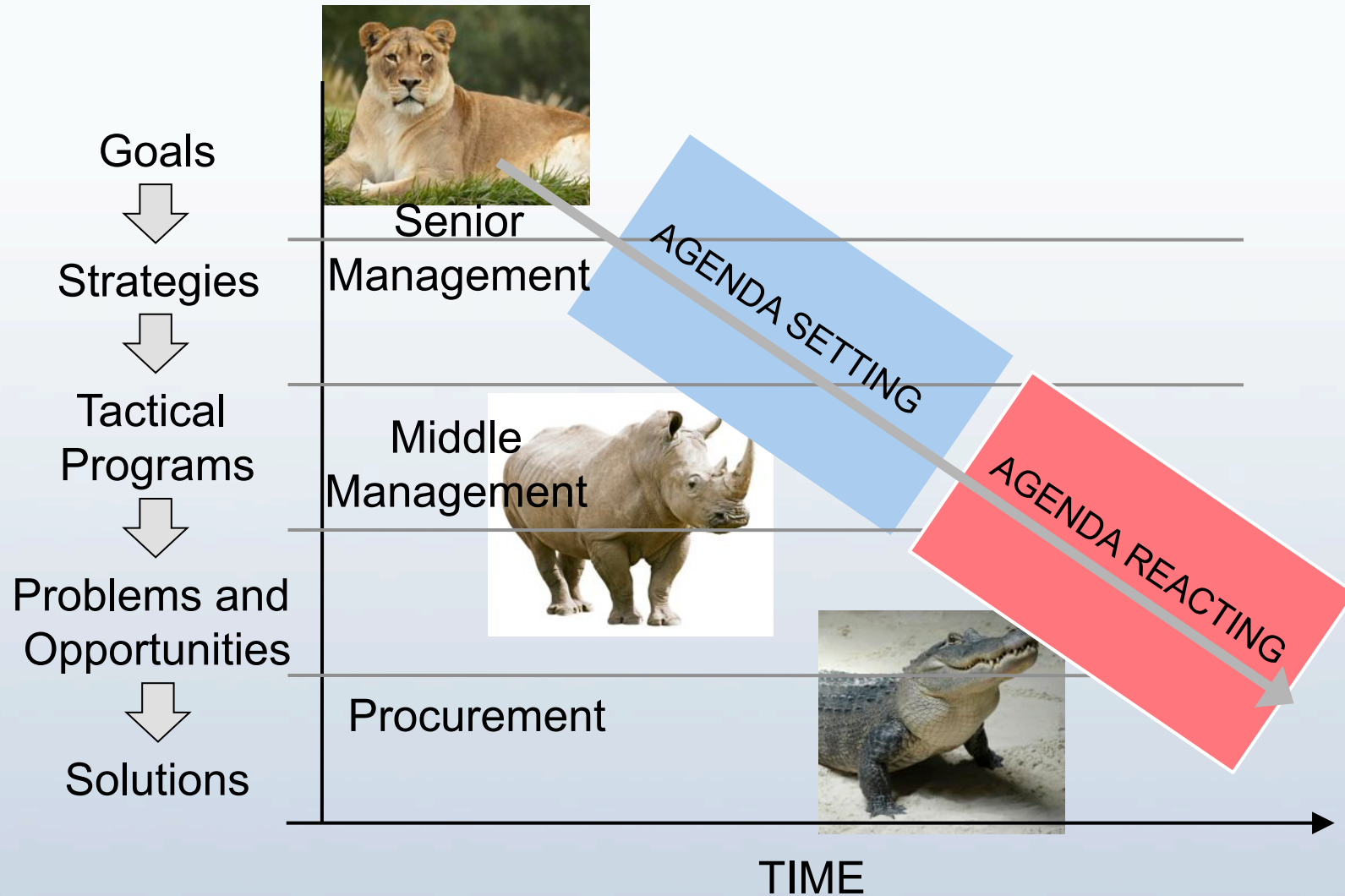
“The difference between successful people and really successful people is that very successful people say no to almost everything.”

# The Advisor Mindset: Check Yourself



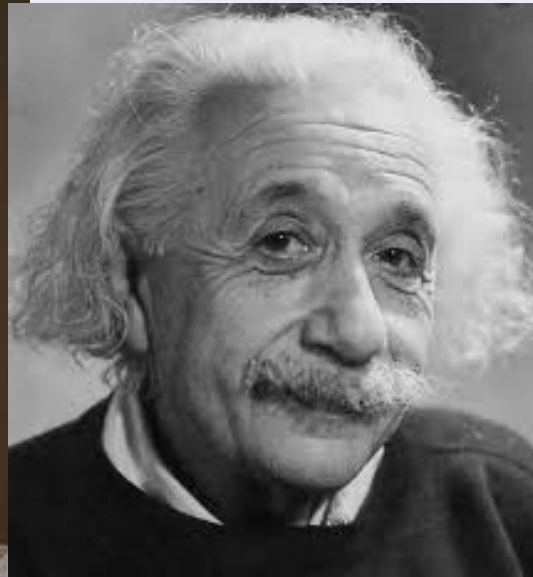
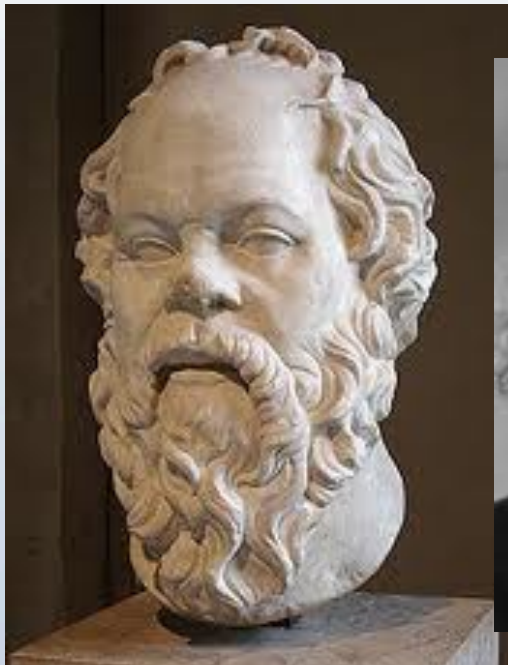
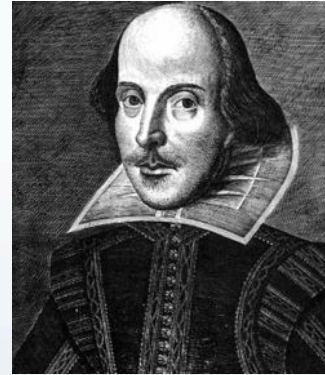
The Expert for Hire	The Client Advisor
Tells	Asks great questions and listens
Is for hire	Has “selfless independence”
Has deep expertise	Is a <i>deep generalist</i> (expertise + business acumen)
Analyzes	Analyzes and <i>synthesizes</i>
Builds professional credibility	Builds deep personal trust
Is reactive	Is a proactive agenda setter
Sells	Creates a buyer

# The client planning and action cycle



# Using Power Questions to develop client understanding

?



# Four types of Power Questions

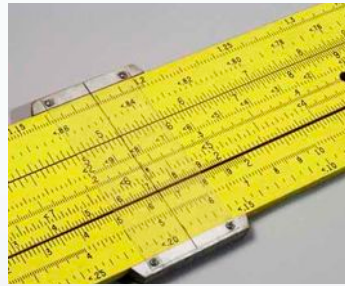


# Perennial business concerns among top executives



# Six roles you can play

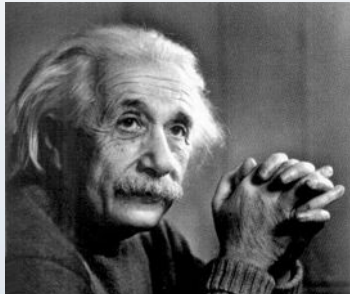
① Expert



② Market Crossroads



③ Big Picture Thinker



④ Visionary



⑤ Company Insight



⑥ Sounding Board



# Building personal relationships



- Be curious
- Change the relationship environment
- Be human—vulnerability is powerful
- Find commonalities
- Have a great conversation

# Create a bigger canvas...starting in your mind

IDEA WATCH

## Defend Your Research

*HBR puts some surprising findings to the test.*



### You'll Golf Better If You Think Tiger Has Used Your Clubs

**The finding:** People who believed that a professional golfer had used their club putted more accurately than other people who played with the same club.

**The research:** Sally Linkenauger and four colleagues recruited 41 right-handed golfers. Each was given a high-end putter and asked to attempt 10 two-meter putts on an artificial green. As they were handed the club, golfers in a randomly chosen group were

sional's club gave them c  
increased their self-effic  
they'd perform better, so  
Is that confidence why th  
the hole to be larger?  
Previous research had sh  
someone successfully sin  
perceive the hole as larg  
look at people's percenti

Sally Linkenauger is a research scientist at the Planck Institute Biological Cybernetics in Tübingen, Germany.



# Follow-up Resources

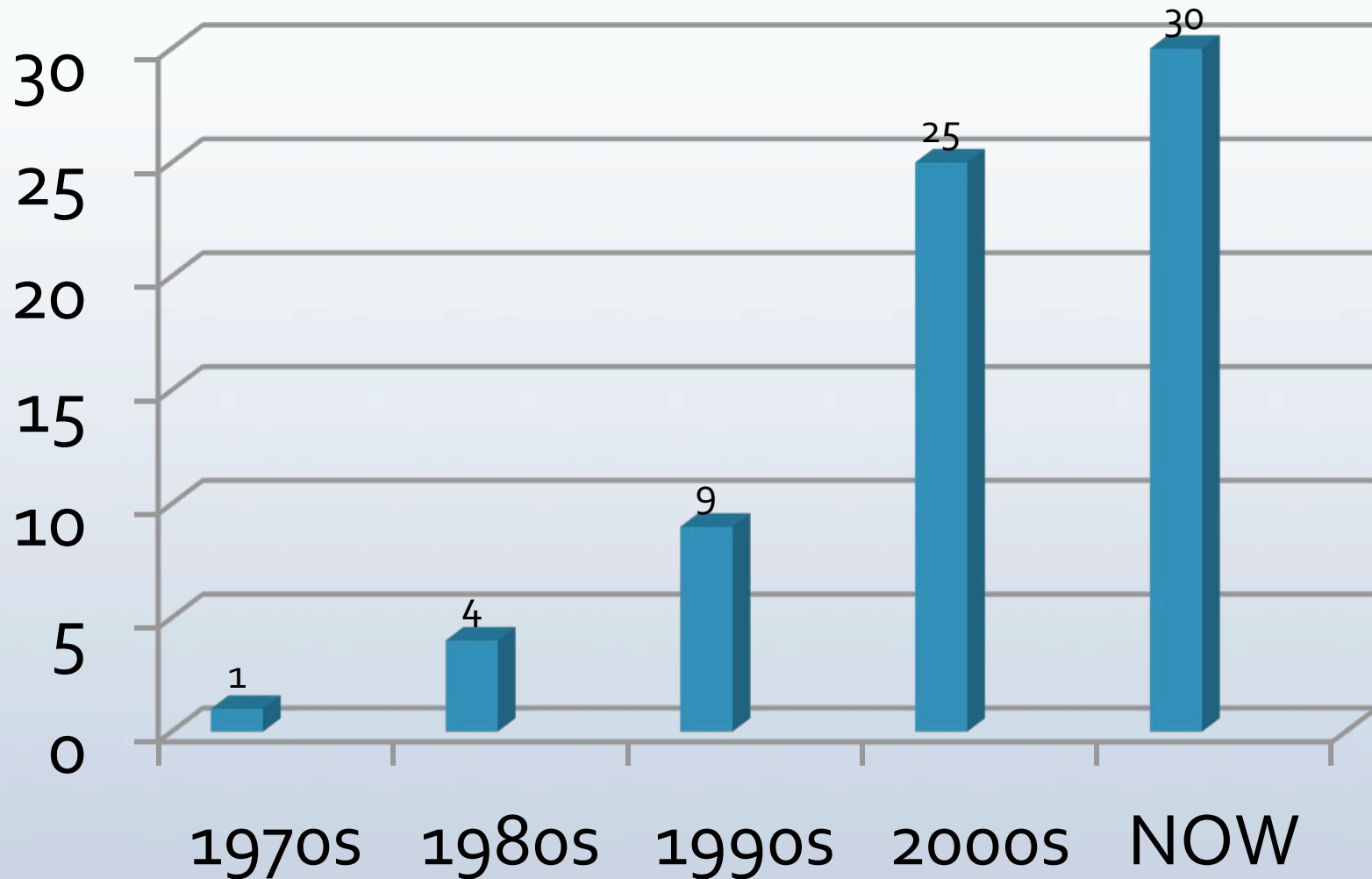
<http://andrewsobel.com/zs>

## DOWNLOAD:

1. A copy of these slides
2. Power questions lists
3. Client agenda setting tool
4. Checklists:
  1. Getting to know clients as people
  2. How well do you really know your client?
  3. Adding value for time
  4. Becoming a person of interest to senior executives

# No. of communications/executive/year

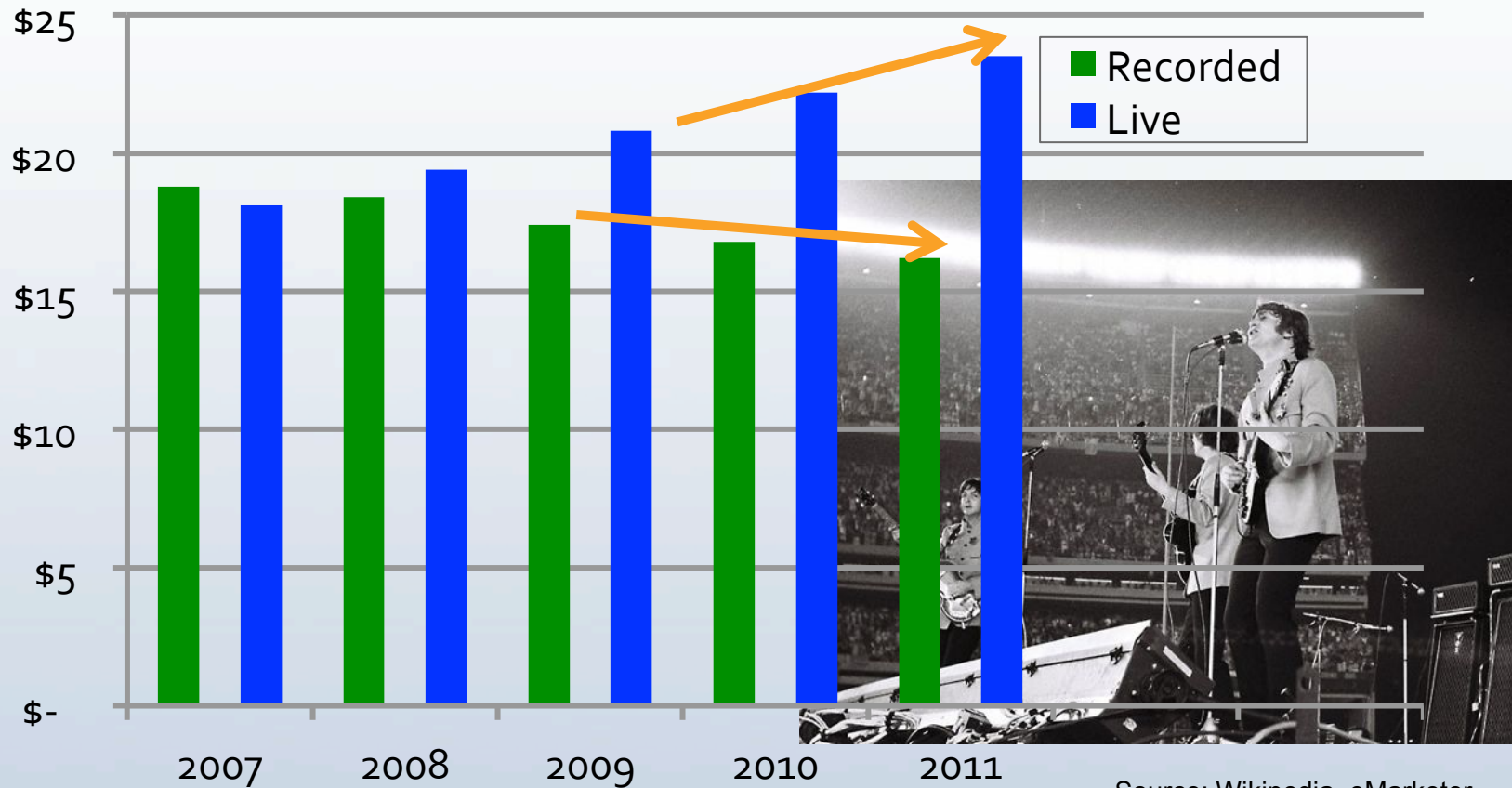
(Thousands)



Source: Harvard Business Review May 2014

# Focus on the live performance

\$ Bn Worldwide revenue from recorded versus live music



Source: Wikipedia, eMarketer