

Building Trusted Client Partnerships

Aon Hewitt Retirement Consulting
Partner Meeting
October 24, 2014

Andrew Sobel Advisors

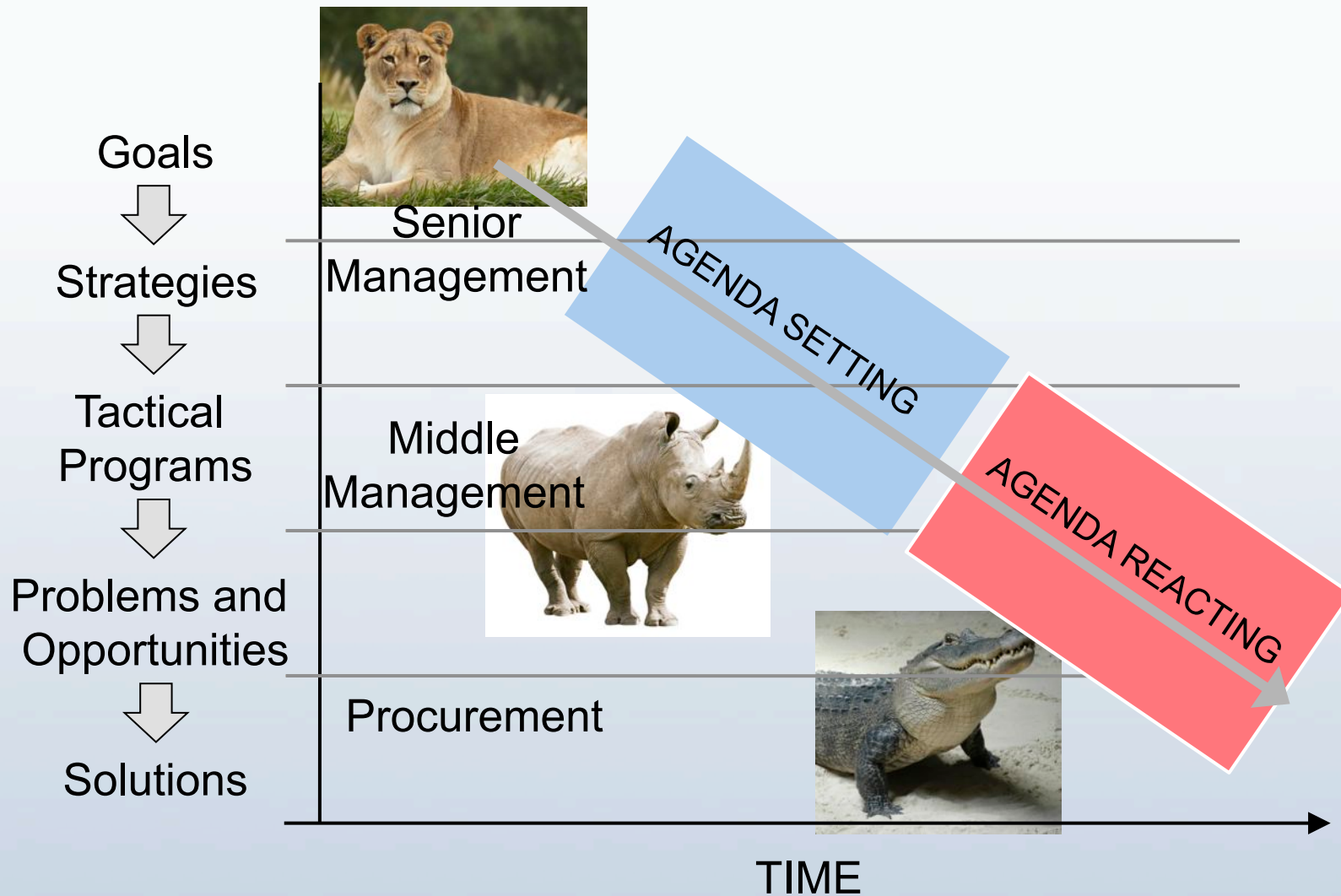


The Advisor Mindset: Check Yourself



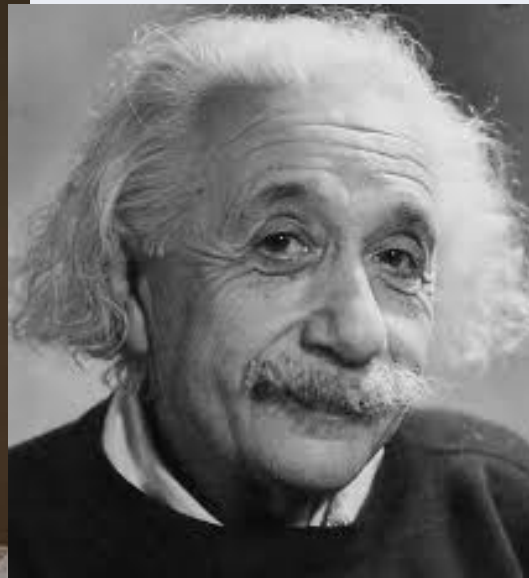
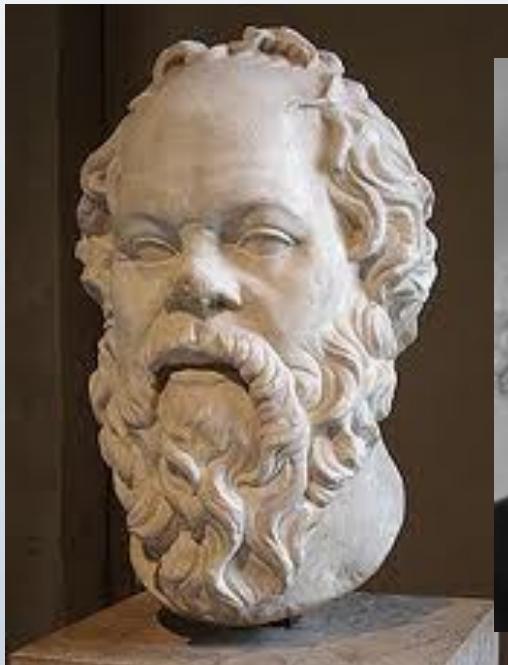
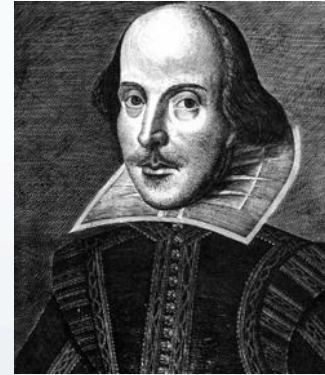
| The Expert for Hire | The Client Advisor |
|---------------------------------|--|
| | |
| Tells | Asks great questions and listens |
| Is for hire | Has "selfless independence" |
| Has deep expertise | Is a <i>deep generalist</i> (expertise + business acumen) |
| Analyzes | Analyzes and <i>synthesizes</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





1. Face Time



2. Humor



The Beatles' first press conference in America



3. A role for everyone



Ringo

Paul--Yesterday

George

4. Evolving Your Songs

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Follow-up Resources

<http://andrewsobel.com/aonhewitt>

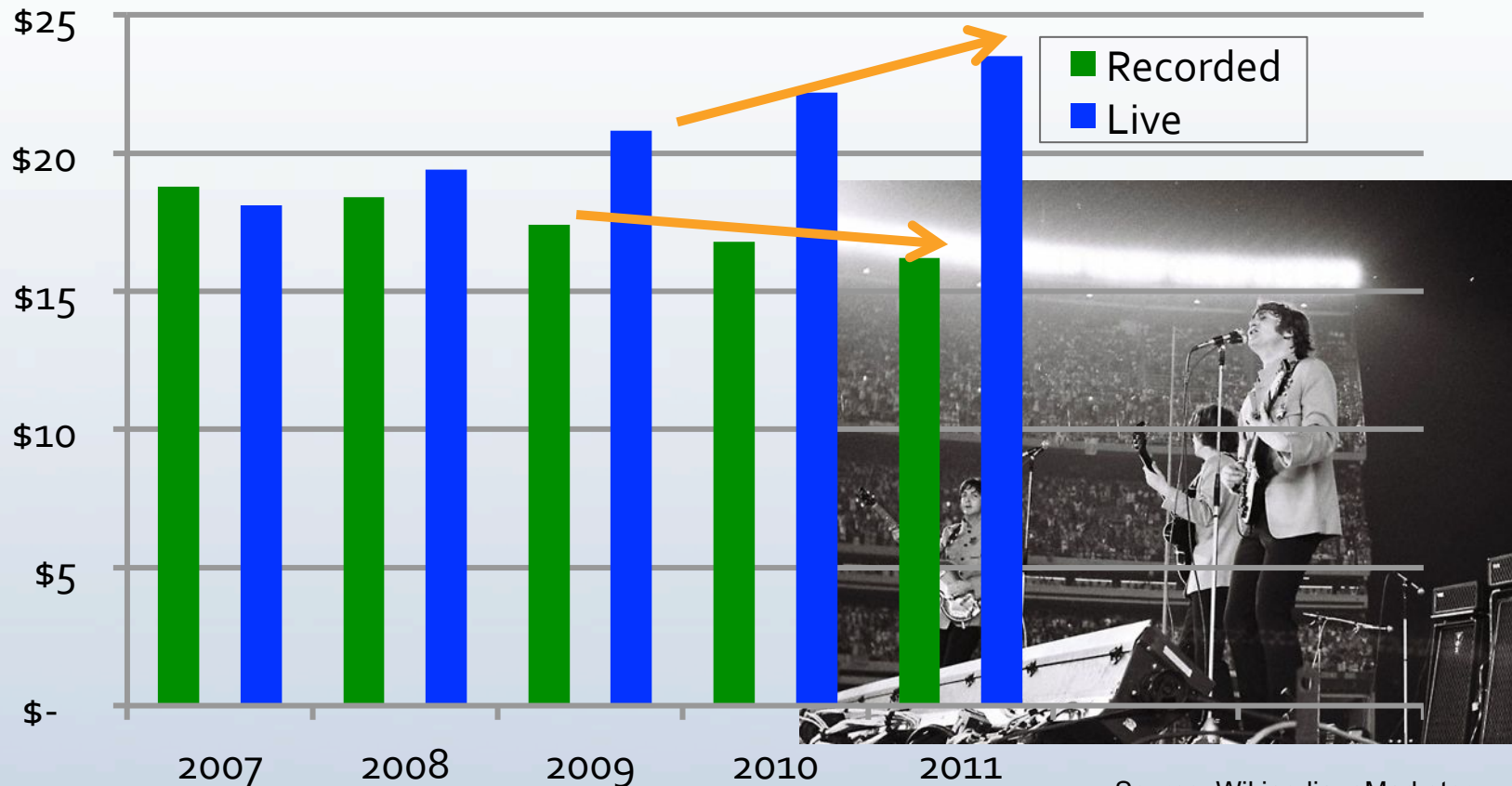
1. A copy of these slides
2. The Beatles Principles summary
3. Client executive engagement form
4. Power questions lists

What to do next

- Cultivate the broader advisor mindset
- Hold regular agenda-setting conversations
- Bring three great questions to every meeting
- Learn more about your client's world--use the client engagement worksheet
- Spend 10 minutes with 40 colleagues
- Go for the live performance

Focus on the live performance

\$ Bn Worldwide revenue from recorded versus live music



Source: Wikipedia, eMarketer