

Building Trusted Client Partnerships

Aon Hewitt PRT Leadership Meeting
October 1, 2014

Andrew Sobel Advisors

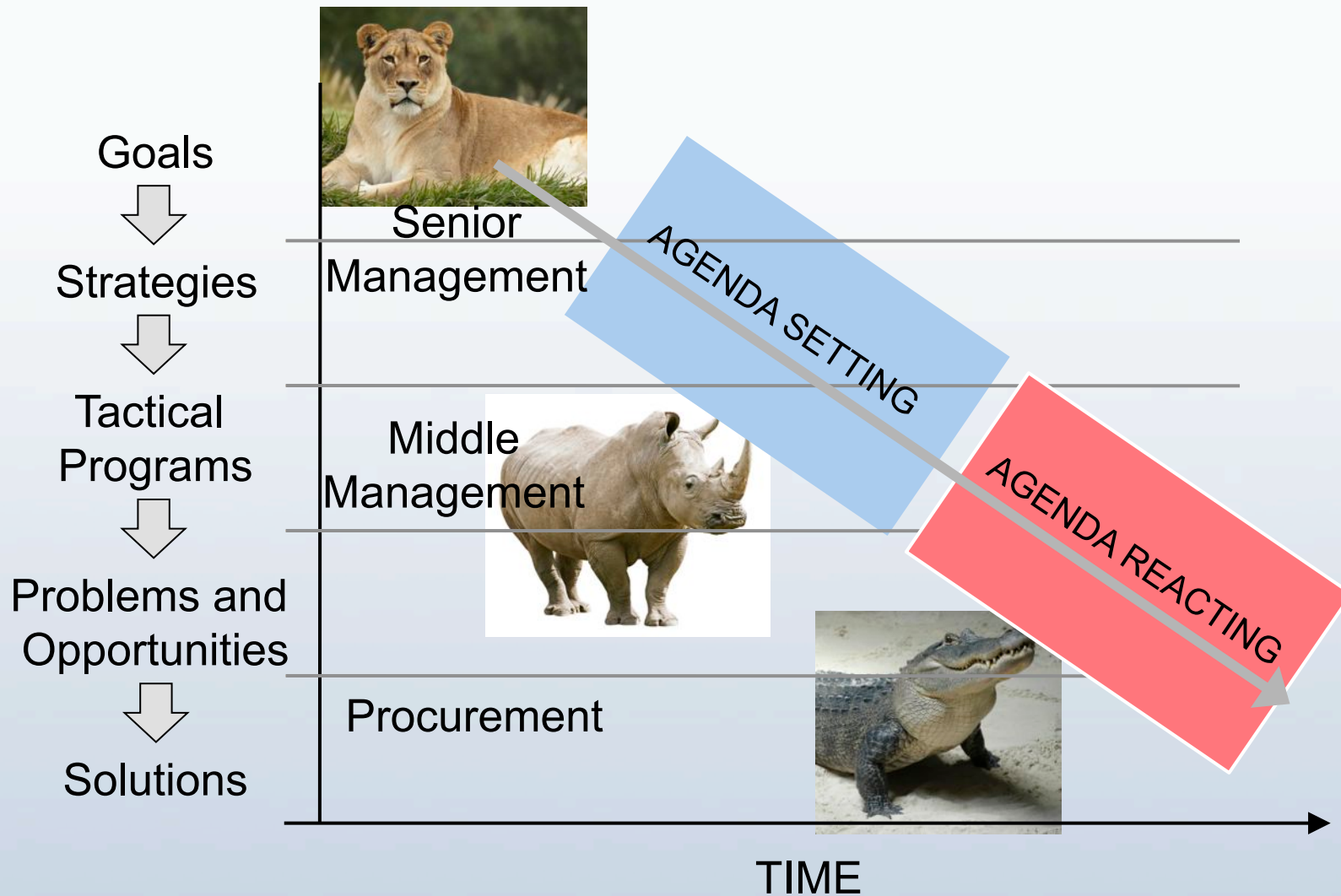
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The Advisor Mindset: Check Yourself



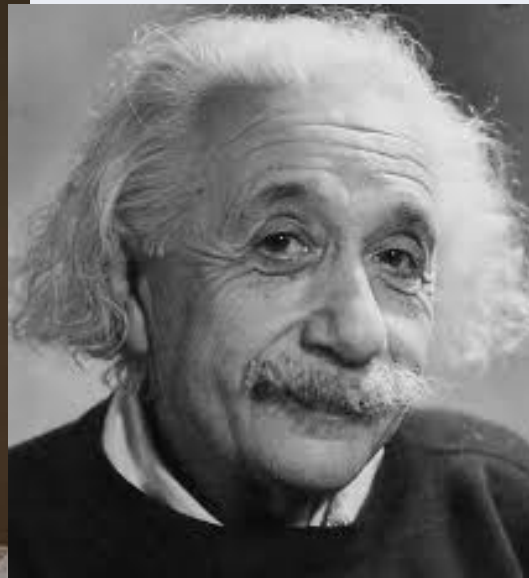
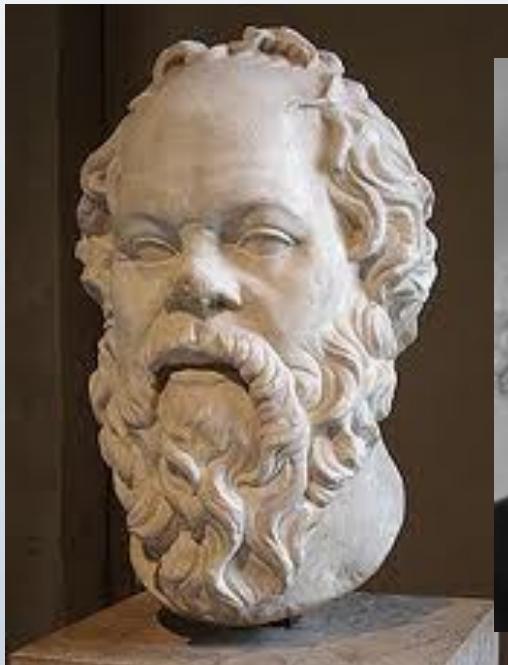
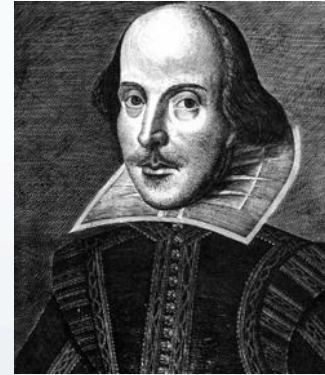
The Expert for Hire	The Client Advisor
Tells	Asks great questions and listens
Is for hire	Has "selfless independence"
Has deep expertise	Is a <i>deep generalist</i> (expertise + business acumen)
Analyzes	Analyzes and <i>synthesizes</i>
Builds professional credibility	Builds deep personal trust
Is reactive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

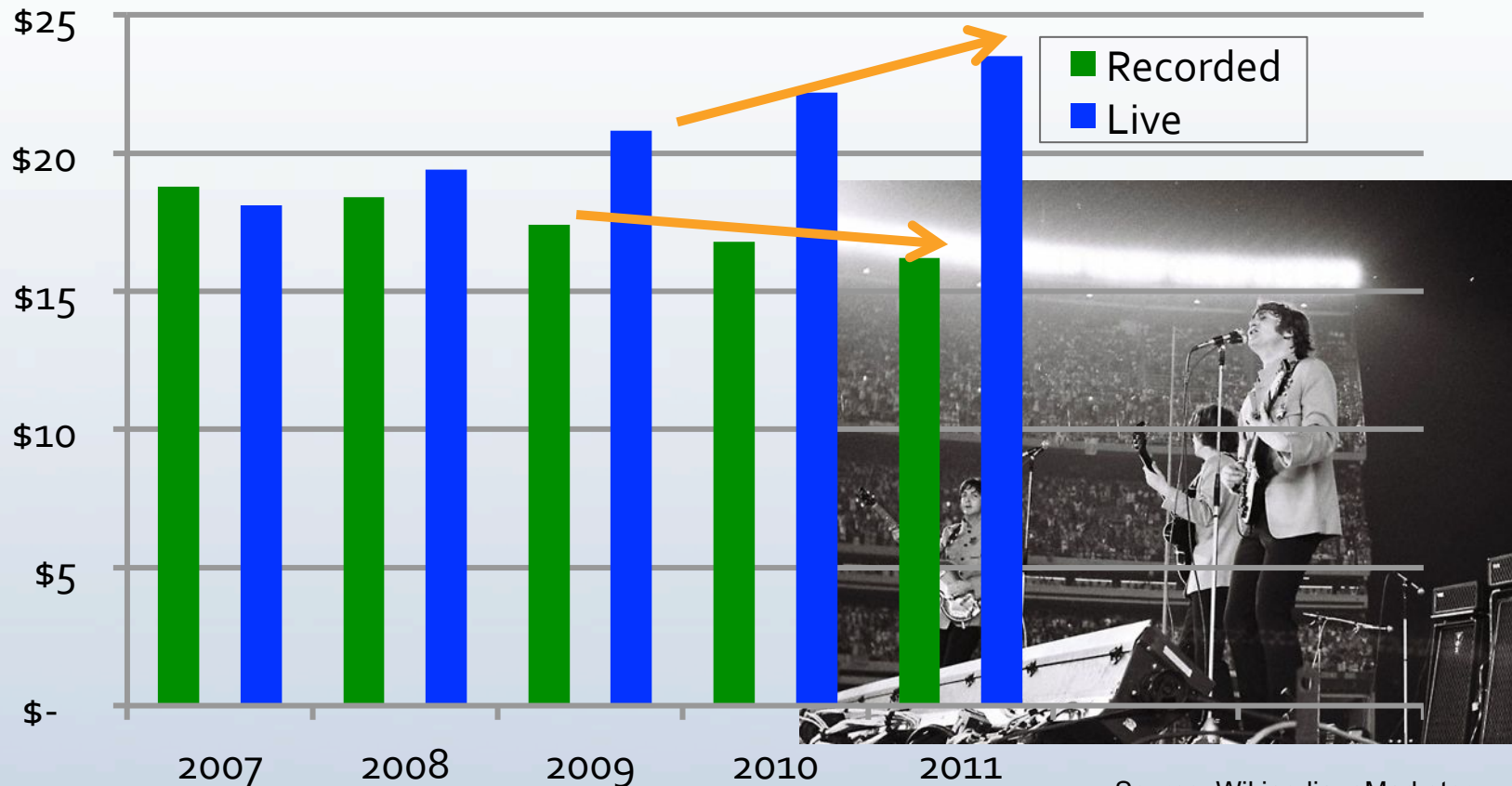
1. A copy of these slides
2. The Beatles Principles summary
3. Client executive engagement form
4. Power questions lists
5. First meeting 32 pt. checklist

What to do next

- Cultivate the advisor mindset
- Hold regular agenda-setting conversations
- Bring three great questions to every meeting
- Reach out and get to know 50 new colleagues this year
- Go for the live performances

Focus on the live performance

\$ Bn Worldwide revenue from recorded versus live music



Source: Wikipedia, eMarketer

One person...\$175 Billion in deals?

Goldman, Citi, UBS . . . and a Guy in an Office

Anyone looking at the mergers and acquisitions “league tables” — the Wall Street equivalent of Major League Baseball’s stand-

JAMES B. STEWART

ings — during this hot year for merger activity would find the usual suspects: Morgan

A Solo Deal Maker Totals \$175 Billion, Rivaling Firms

ing the French cement maker Lafarge in its \$60 billion merger with another giant cement maker, Holcim, of Switzerland. Robertson Robey Associates, a microfirm that was known as “the three Simons” — Simon Robey, Simon Wershow and Simon Rob-

