

# Developing Your Clients for Life

Locke Lord Partner Retreat  
April 25, 2015

Andrew Sobel Advisors

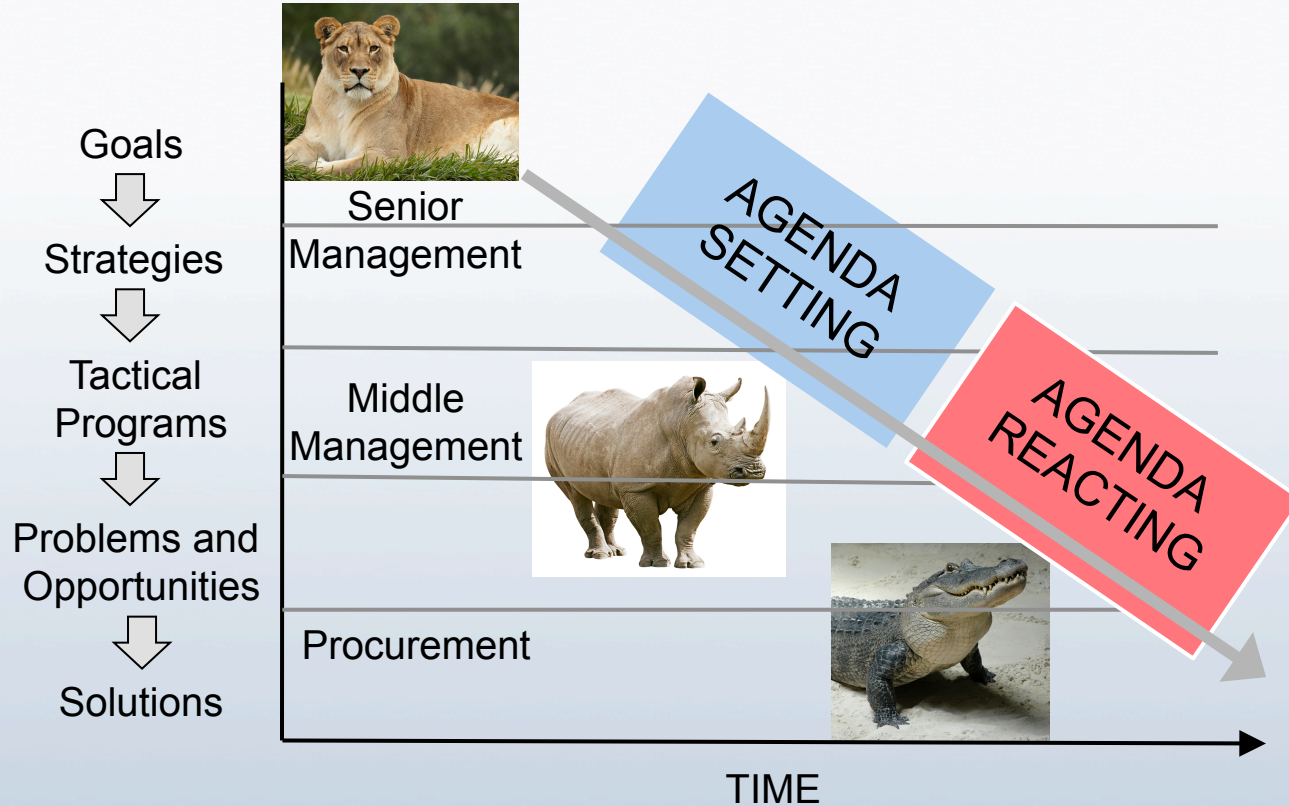
Locke  
Lord<sup>LLP</sup>

# 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 legal 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



# What you see when you are Agenda Reacting

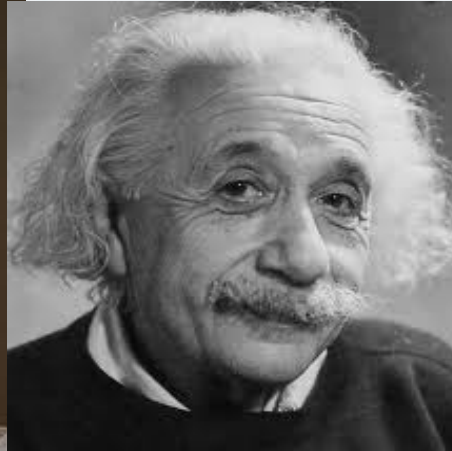
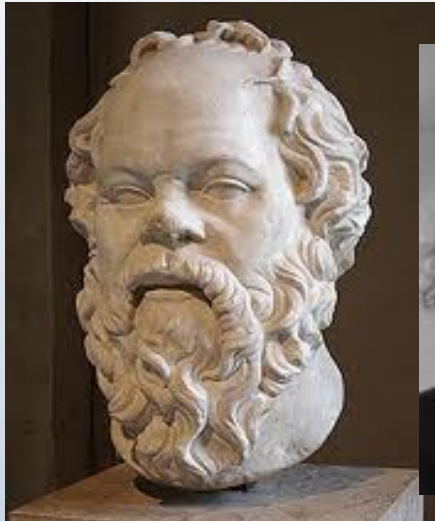
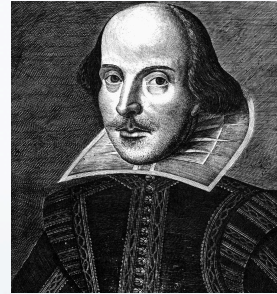


# What you see when you are Agenda Setting



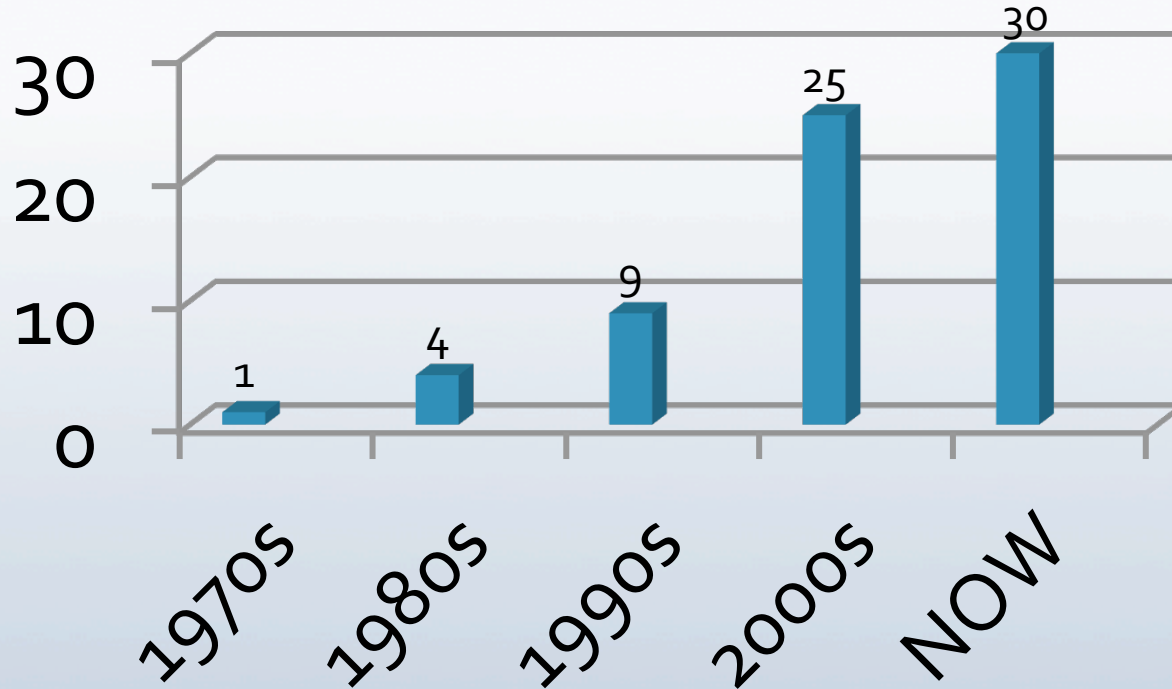
# Using Power Questions to develop client understanding

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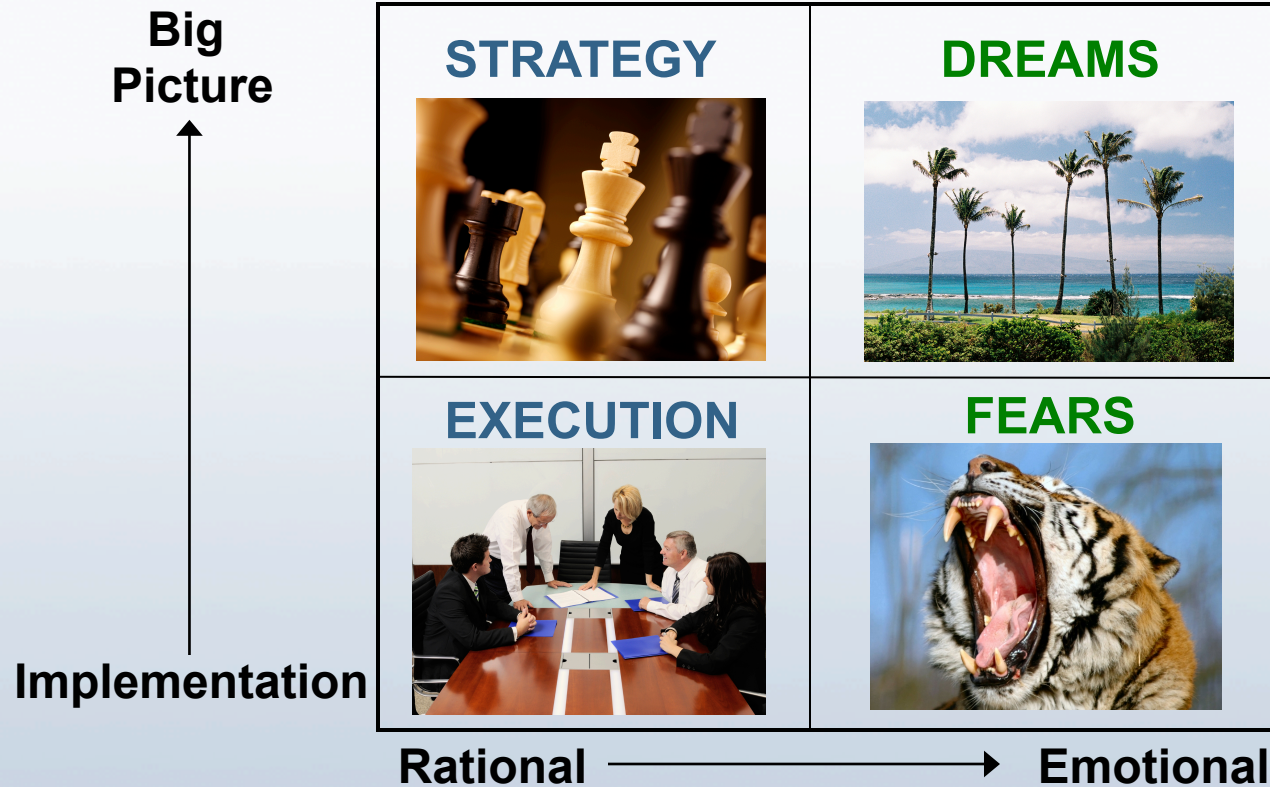


# No. of communications/executive/year

(Thousands)



# Four types of Power Questions



# Building the trust that fuels collaboration

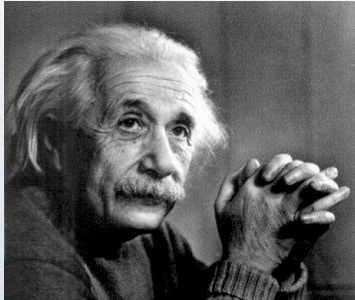


# Six roles you can play

① Legal Expert



② Market Crossroads



③ Big Picture Thinker

④ Visionary



⑤ Company Insight



⑥ Sounding Board



# Follow-up Resources

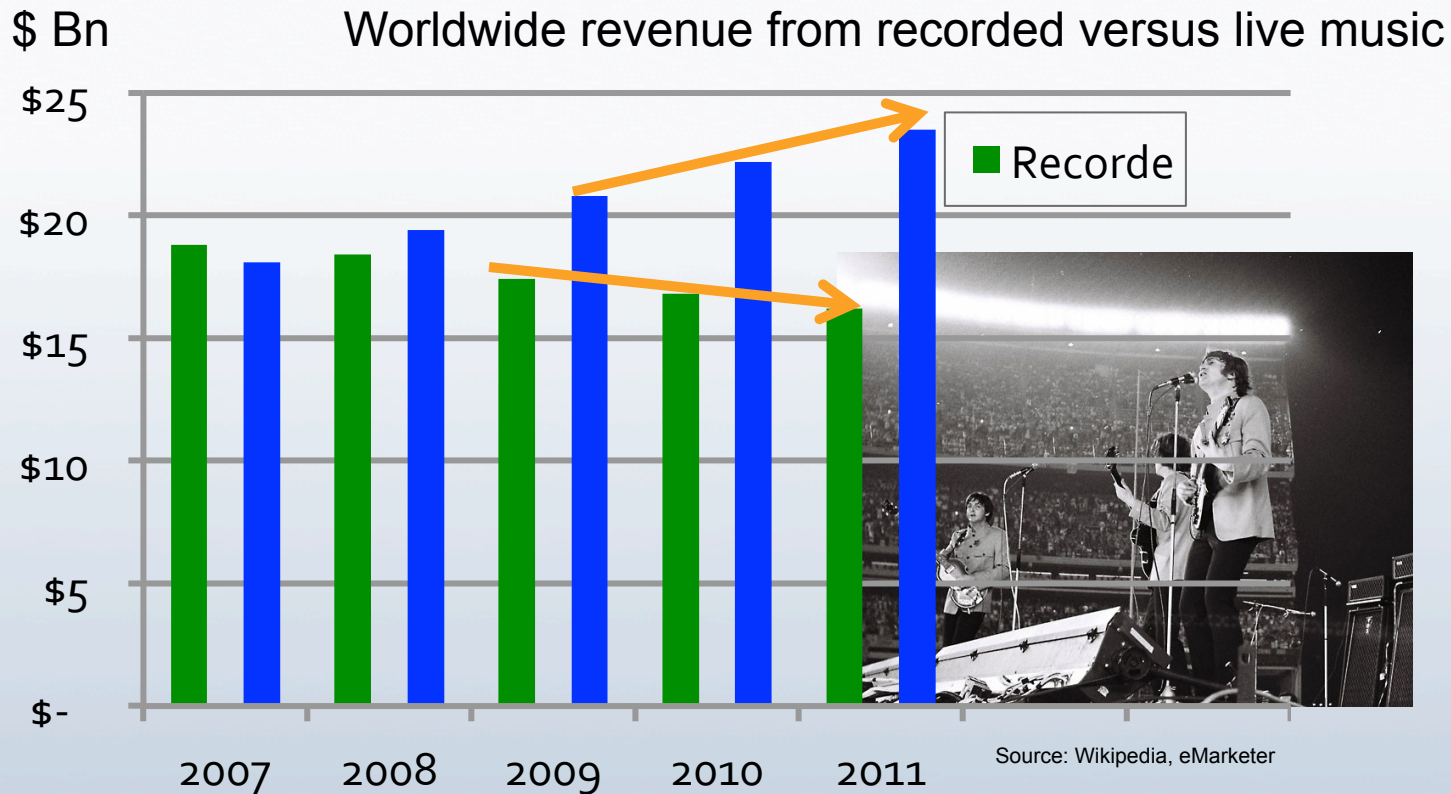
<http://andrewsobel.com/lockelord>

1. A copy of my slides from the plenary partner session
2. A copy of my slides from the Practice Group lunch presentation
3. The Beatles Principles Summary
4. Client executive engagement form
5. Power questions lists
6. First meeting/business development 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 40 new partners this year
- Go for the live performances

# Focus on the live performance



# The ultimate secret

