


Application Exercise One

Do You Have the Expert Mindset or the Advisor Mindset?

1. Check the box towards the left, middle, or right to indicate which end of the spectrum you are currently at. That is, for each area, are you closer to the “expert mindset” or the “advisor mindset”?

The Expert Mindset		The Advisor Mindset
OFTEN:	Where would you place yourself?	OFTEN:
Is for hire—says “Yes”		Has “selfless independence”—is willing to say “no”
Tells and gives answers		Asks good questions and listens
Is a specialist		Is a deep generalist, combining knowledge depth with breadth
Is good at analysis		Is a big picture thinker who is good at analysis and synthesis
Builds credibility		Builds personal and professional trust
Is reactive		Is a proactive agenda setter
Sells		Creates a buyer
Focuses on transactions		Focuses on relationships
Has a scarcity mindset		Has an abundance mindset

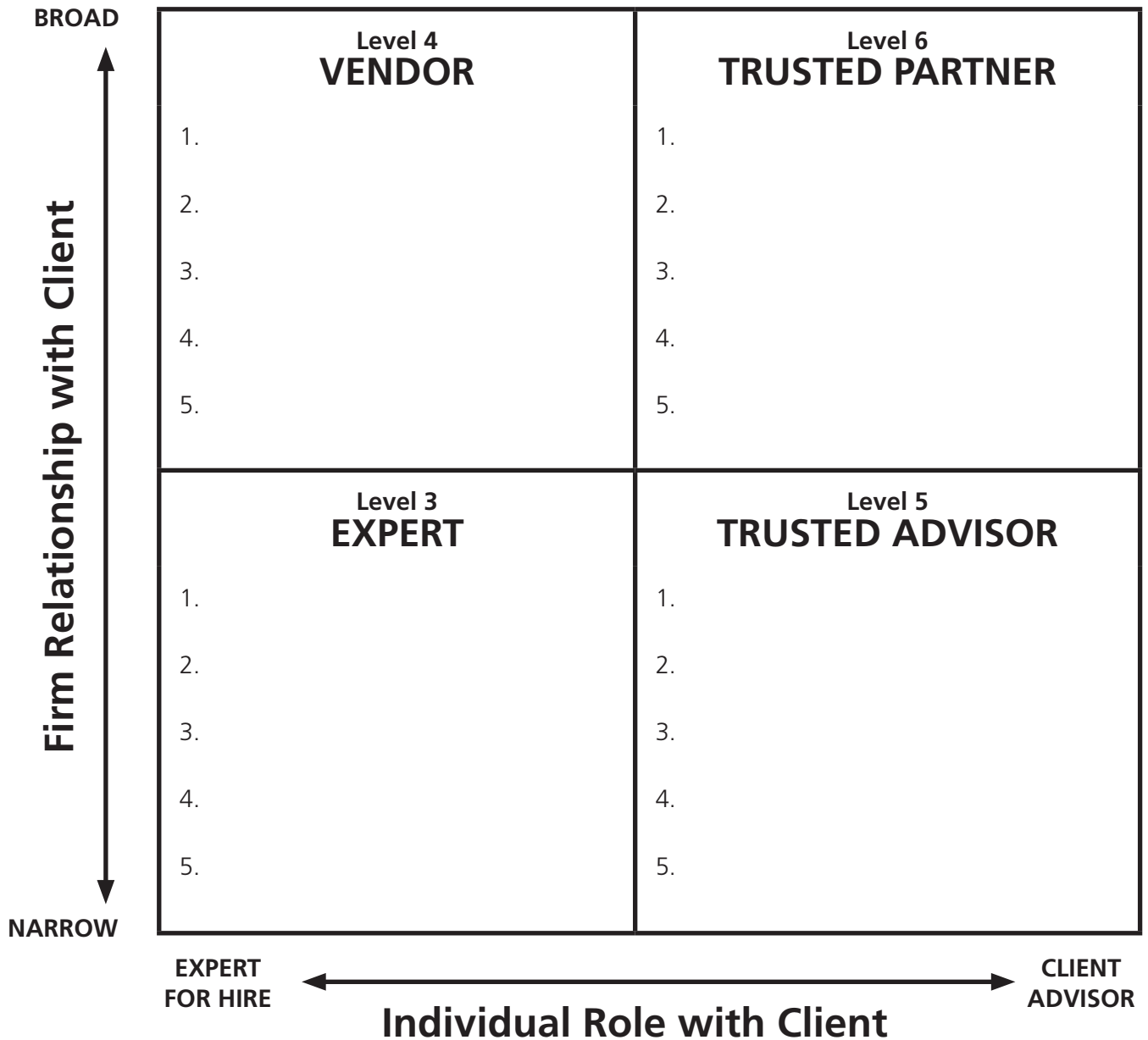
Questions to reflect upon:

1. In which areas do you most exemplify the advisor mindset?
2. In which areas do you behave more like an “expert-for-hire”? Why do you think that is?
3. Where would you most like to focus on changing and improving?

Application Exercise Two

Assess Your Client Portfolio

1. Assess your client portfolio by categorizing your current client relationships as either “Expert,” “Vendor,” “Trusted Advisor,” or “Trusted Partner.”
2. List all of your current clients in the appropriate quadrants.



Questions to reflect upon:

1. What strikes you as you look at where your clients fall into the different quadrants?
2. Which clients at levels 3 or 4 have the largest potential to grow and to develop into levels 5 and 6? What would it take to do that?
3. Are there some clients you should try to drop or de-emphasize?

(Note: Level 1=Contact, Level 2=Acquaintance)

Use Agenda Setting Strategies in an Upcoming Client Meeting

You will generate ideas about how to make your next client meeting an Agenda Setting event. Your goal is to bring new perspectives and ideas to the meeting and clearly tie your operational conversations to one or more of your client's key priorities.

1. Think of an upcoming client meeting.
2. Use the client worksheet on the following page to gather your thoughts.
3. Take 5 minutes to brainstorm how you could give an “Agenda Setting” flavor or dimension to that meeting.
 - a. How can you elevate the discussion beyond a review of project execution or the status of your milestones?
 - b. How could you bring some new ideas or perspectives to the session?
 - c. How could you use it as an occasion to clarify the client's evolving priorities or needs and/or to clearly link your work to those priorities?
 - d. What “Agenda Setting” questions could you formulate and bring to your meeting?
4. Write down your ideas and action steps in the worksheet on the following page.

Application Exercise

Use Agenda Setting Strategies in an Upcoming Client Meeting

Name of my client:	Date of next meeting:
<p>Actions I can take to introduce Agenda Setting into this meeting to either more firmly connect the discussion to the client's key goals and/or to showcase new ideas and perspectives.</p> <p>Ask yourself:</p> <ul style="list-style-type: none">• How can I elevate the discussion beyond a review of project execution or the status of my milestones?• How could I bring some new ideas or perspectives to the session?• How could I use it as an occasion to connect our work to the client's agenda of key priorities and/or to help refine them?• What thought-provoking questions can I ask?	
Action 1:	
Action 2:	
Action 3:	
Action 4:	
Action 5:	

Application Exercise One

Accelerate Trust with a Prospective Client

Write down the name of a prospect—of the individual executive, not the company—with whom you are going to be meeting. Review the checklist, below, and identify the trust-acceleration strategies that you feel would be effective in this particular circumstance.

Name of prospect (individual):		
Trust Acceleration Strategies	Check if this is a strategy you would like to emphasize	Any specific next step?
1. Get a warm introduction or recommendation from someone the prospect trusts.		
2. Spend the time to pull together value-added insights, e.g.: Market information, competitive trends, best practices, an industry “point of view,” data on customer behavior and attitudes, etc.		
3. Conduct in-depth preparation: Research the company, the executive you’re meeting, industry trends, the history of the company, etc.		
4. Make an offer to invest: e.g. to explore an issue, do a diagnosis, etc.		
5. Build more face time: Create more opportunities to connect face-to-face.		
6. Obtain and use third-party endorsements: These can include testimonials, references, publications, and so on.		
7. Explicitly talk about your relationship focus and long-term orientation.		
8. If appropriate, say “no” to something: e.g. a request to do something you aren’t that good at or don’t believe is the right thing to do for the client.		
9. Get your prospect to speak or meet and discuss your work with a current client, who shares their problems.		
10. Boldly put unspoken issues/concerns on the table.		

Application Exercise Two

Improve Trust in a Key Relationship

Write down the name of a client—of the individual executive, not the company—with whom you feel you need to develop greater trust. Evaluate each ingredient for trust in that relationship by circling a number between 1 and 5 in the second column.

Finally, for any trust ingredients that you scored a 1, 2, or 3, write down a next step you can take to improve the client's trust.

Name of client (individual):						
Trust ingredient	Your current assessment (check one)					Next step to strengthen this trust ingredient
	1	2	3	4	5	
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	
1. Competence: Client trusts I have the requisite experience and can deliver.						
2. Integrity: Client trusts that I am honest, consistent, reliable, and discrete.						
3. Agenda Focus or Intent: Client believes I am focused on their agenda and needs.						
4. Risk: Client perceives a low risk in trusting me.						
5. Face Time: You have shared sufficient face-to-face time with the client to build familiarity.						
6. Others (specify)						

Application Exercise

Assess Your Listening Skills

Take this brief assessment of your listening habits, below. Put a “1” for yes and a “0” for no as you answer the question, “Do you ever...?” for each of the statements.

DO YOU EVER...	Yes (one point)	No (zero points)
1. Interrupt others during a conversation?		
2. Rush people who come to give you information or ask for advice?		
3. Think ahead when others are talking?		
4. Finish people’s sentences for them?		
5. Do more than one thing when listening to others (for example, check your email while you’re talking on the phone)?		
6. Start thinking about your response before the other person has finished making their point?		
7. Fake attention while others are talking?		
8. Prepare for an important client meeting by spending most of your time constructing what you’re going to say (as opposed to investing time in formulating questions)?		
9. Forget the names of people you’ve just met?		
10. Look at your watch or a clock when others are talking?		
TOTAL POINTS		

How did you do?

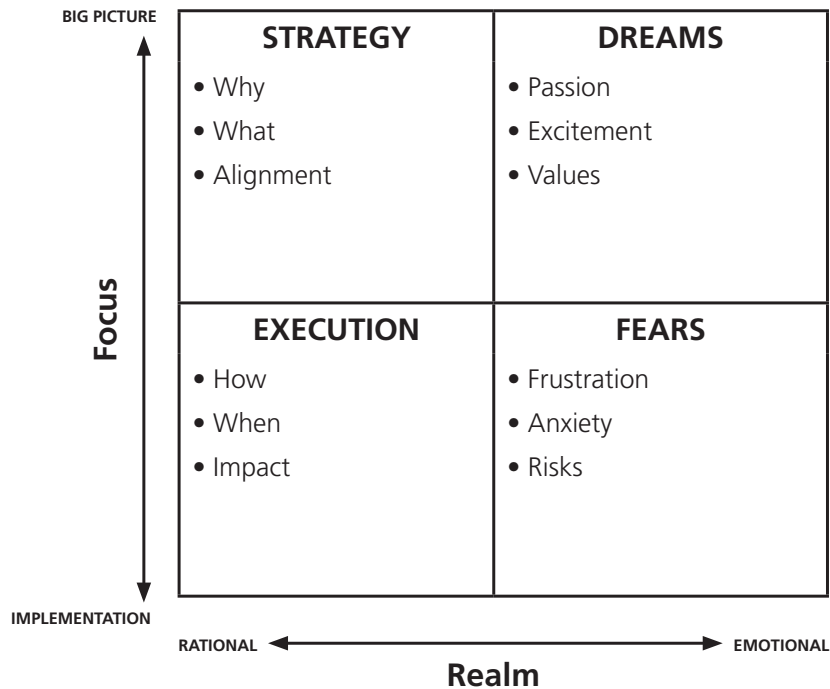
0–3 points: You’re a very good listener

4–6 points: Plenty of room for improvement

7–10 points: You’ve got your work cut out for you!

Application Exercise

Create Your Own Questions Using the Power Questions Matrix



Choose a current client with whom you'd like to deepen your relationship. Take a few minutes to write down at least one question you'd like to ask this individual in each of the four quadrants.

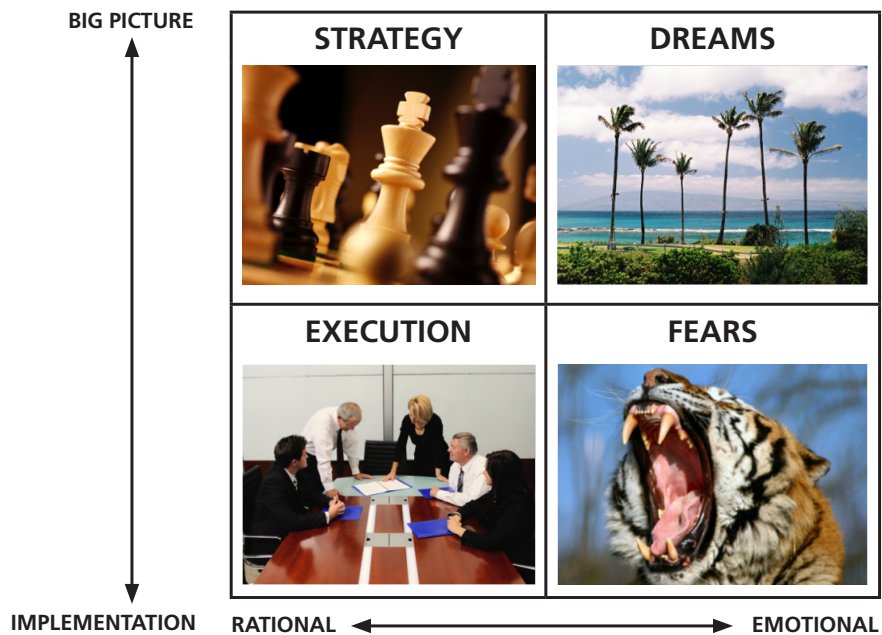
Client Name:

1. Strategy (e.g. "Why have you decided to pursue this particular program?")

2. Execution (e.g. "How will this impact your customer service?")

3. Dreams (e.g. "As you look ahead to the next few years in your business, what are you personally most excited about?")

4. Fears (e.g. "As you look at your implementation timetable, what makes you the most nervous?")



Application Exercise

Cultivate Your Selfless Independence

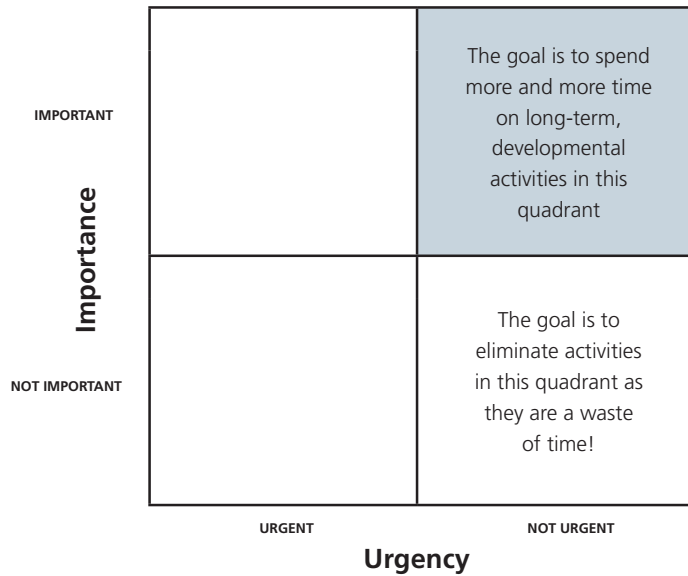
Reflect on the questions, below, and write down your answers in the spaces provided.

1. Can you recall an incident with a client—or someone else in your life—when you had to “draw a line” and say “no” or pull away? Perhaps an incident when it was costly or painful for you to demonstrate your independence? What was the event, and why was it hard for you?
2. Make a brief list of the behaviors, actions, situations, and/or types of clients you will not tolerate and are willing to walk away from.
3. Are you faced with a situation today where you need to demonstrate more “Selfless Independence” (at work or in your personal life)? What is your dilemma, and what do you feel you should do?

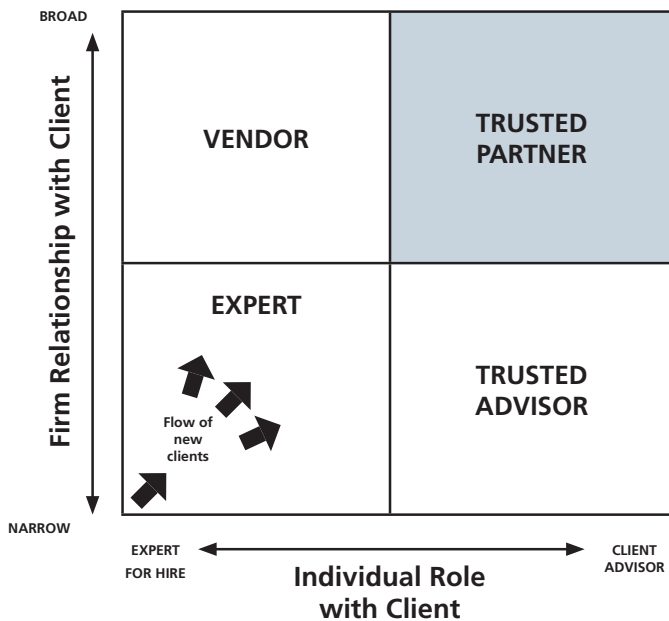
Create Simplifying Frames

On the next page, try creating a couple of your own 2x2 matrices that help explain or frame an important client challenge that you work on. Don't worry about getting them perfect—just try to experiment and see what you come up with. I've put three examples, below, as illustrations. One is the Urgency/Importance matrix that is illustrated in Stephen R. Covey's book, *The Seven Habits of Highly Effective People*. The other two are from my own research and writing.

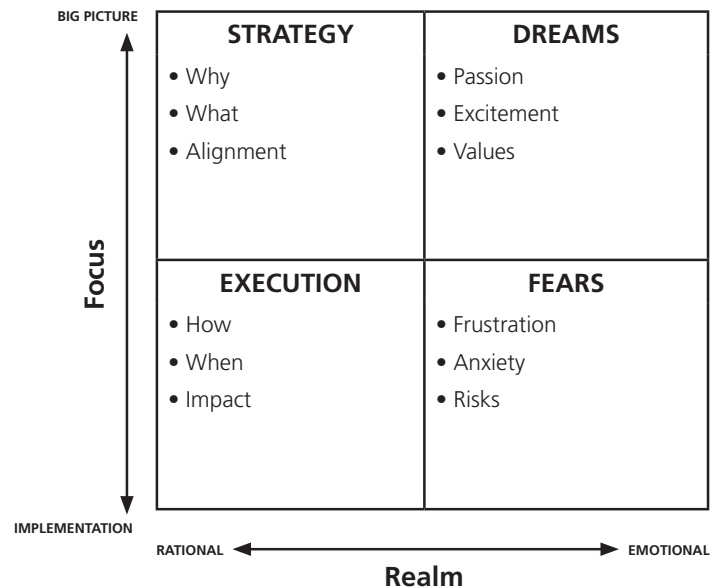
The Stephen R. Covey Time Management Matrix



The Client Growth Matrix



The Power Questions Matrix

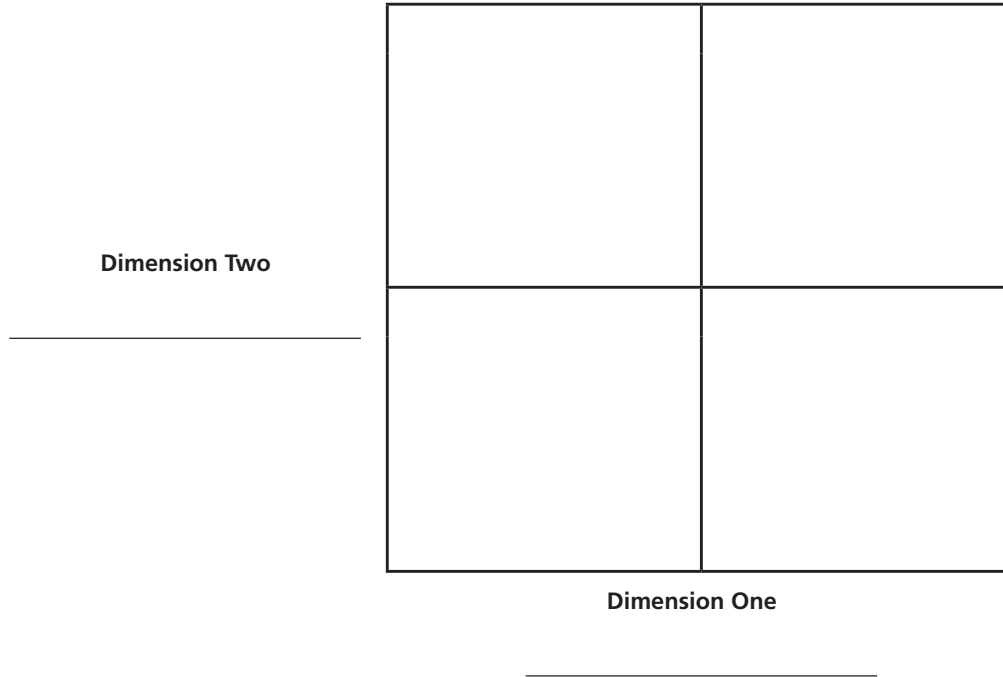


Application Exercise One

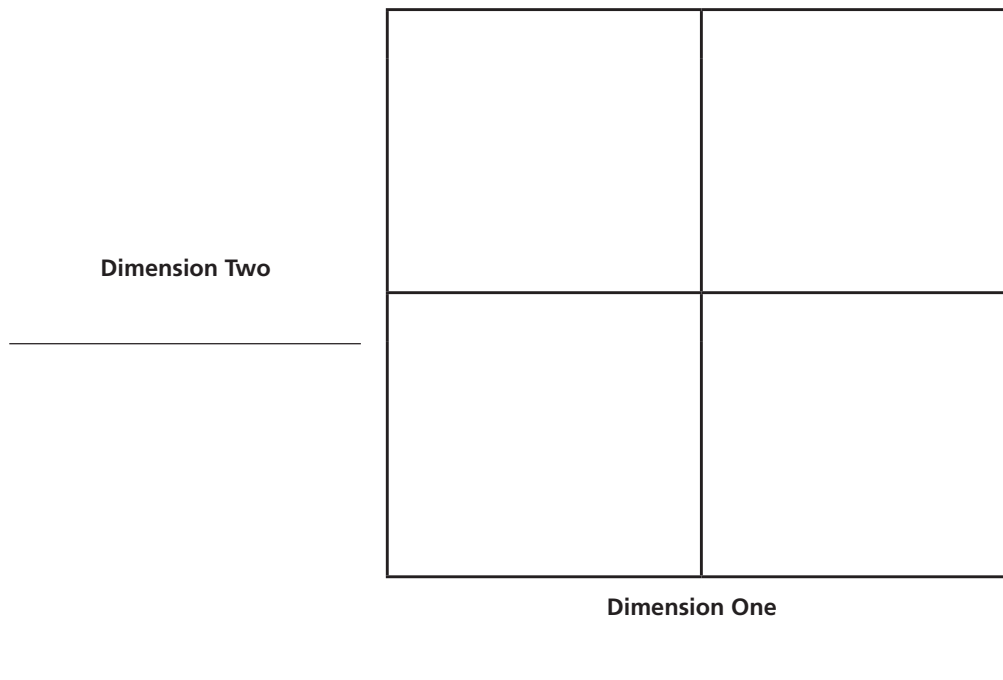
Create Simplifying Frames

Think about a client issue or problem that you address in your work. What are the two key dimensions that frame it—that help categorize different conditions or solutions? Spend some time exploring this, using the blank matrices below. Yours could be factors that go from low to high or they could be yes or no conditions like the Covey matrix—“Urgent versus Not Urgent.” In each case list the issue or issues that your framework addresses.

Framework Title _____



Framework Title _____



Use Big-Picture Thinking Techniques

Think about a client issue or problem you are addressing right now. Write it down at the top of the worksheet on the following page. Could you improve your big picture thinking around this issue by using one or more of the techniques listed in the left-hand column? Check the ones that you think might be fruitful and write down a possible next step.

Application Exercise Two

Use Big-Picture Thinking Techniques

State the Issue or Problem:		
Big Picture Thinking Technique	Opportunity area? (Check)	Next Step or Idea
Foundations: <ul style="list-style-type: none"> • Clear client purpose or goal • Understanding of the whole picture • Highest priority issues identified 		
Simplifying Frames		
Analogies and Metaphors		
Multiple Perspectives		
Patterns and Commonalities		
Set Aside Your Judgment		
Make Time for Reflection		
Observe and Concentrate		
Get Your Hands Dirty—Dig In!		
Others		

Application Exercise

Become a Deep Generalist

Write down at least one action step for each of the four learning categories listed on the left.

Domain	In the next 12 months:	
	Reading you would like to do*	Actions you'd like to take to deepen your knowledge**
Your core specialty	1. 2. 3.	1. 2. 3.
Client knowledge <ul style="list-style-type: none"> • Client as a person • Organization/strategy • Industry • Others 	1. 2. 3.	1. 2. 3.
Business environment <ul style="list-style-type: none"> • Management • The economy • Trends • Competition • General business • Others 	1. 2. 3.	1. 2. 3.
Personal interests <ul style="list-style-type: none"> • Hobbies • Travel • Family • Others 	1. 2. 3.	1. 2. 3.

*Reading: e.g. books (specific titles or just “a book” that you’ll identify later), magazines, web sites, etc.

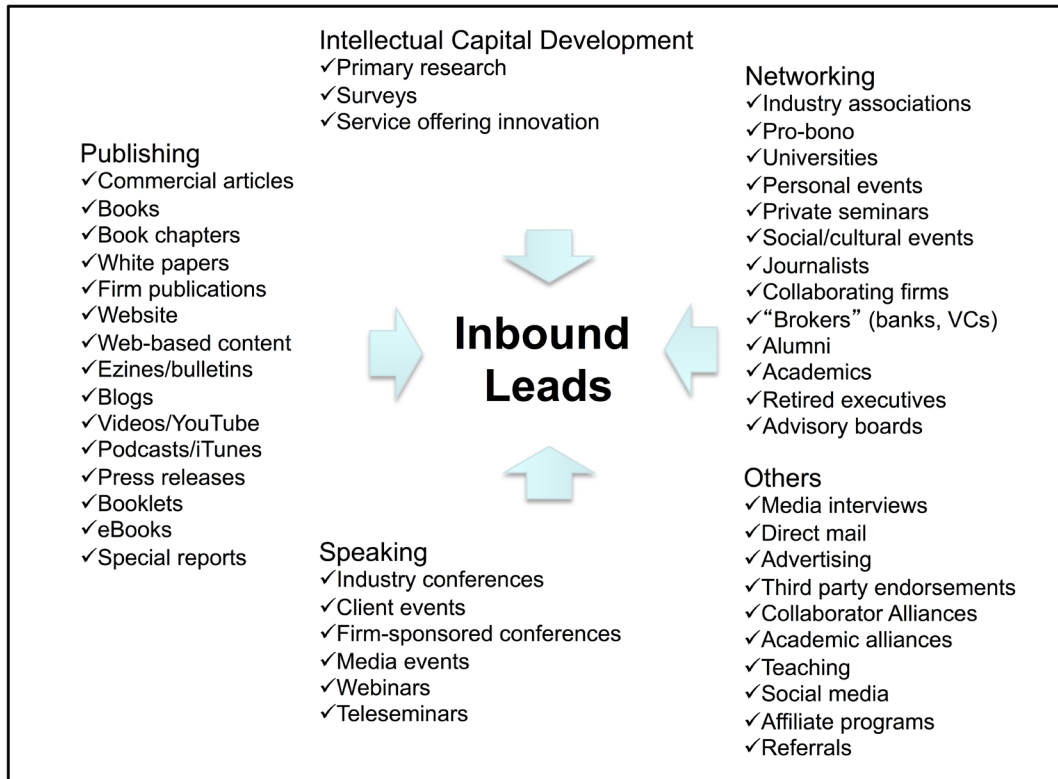
**Actions: e.g. attend an industry conference, go through a training program, work with a new client in a different sector, get the SCUBA diving certification you’ve always wanted, etc.

Application Exercise

Strengthen Your Brand

Write down two or three activities you'd like to undertake over the next 6–12 months, to strengthen your personal brand and reputation in the marketplace. Review the lists, below, to help you think about the activities that are right for you.

Potential brand-building activities



Activities I want to commit to in order to strengthen my brand and reputation in the marketplace:

1.

2.

3.

Identify and Focus on Your High-Priority Relationships

You cannot build deep, trusted relationships with every single person in your professional life. You must focus on the individuals who are or could be the most important to you. People for whom *you* can also make a difference and have an impact. Between 15 and 25 individuals is a manageable number. This exercise asks you to list these *critical few* in six essential categories of relationship capital:

1. **Clients.** Many of your names will probably be in this category. But you need other relationships as well...
2. **Prospective Clients.** These could be individuals you have never worked with before, former clients, dormant clients, or new executives within an existing client.
3. **Colleagues.** If you work within an organization, strong internal relationships with colleagues are essential for success with clients.
4. **Catalysts.** Catalysts are individuals who can “make things happen” and introduce you to others. Often, they are uninvolved in the actual transaction or program. Catalysts could include a board member, a retired CEO, a former client, someone involved in private equity or venture capital, and so on.
5. **Collaborators.** These are often other professional firms or individual practitioners that complement your services and may be a source of opportunities for you.
6. **Counselors.** These are individuals who coach and mentor you. Especially in difficult times, these relationships are an importance source of valuable advice and perspective.

On the next two pages, fill out the left-hand side of each worksheet by listing the 15-25 *critical few* relationships that you’d like to focus on in the next six months. Write down the organization (for clients) and the person’s name. If you can, list an important need or issue you believe you can help them with.

Application Exercise
Identify and Focus on Your High-Priority Relationships

My Staying-in-Touch Plan for High-Priority Relationships			
A. Organization	B. Individual	C. A Need or Issue that You Can Help With	D. Next Step With This Individual
1. Current Clients			
1.			
2.			
3.			
4.			
5.			
6.			
2. Prospective Clients			
1.			
2.			
3.			
4.			
3. Colleagues			
1.			
2.			
3.			

My Staying-in-Touch Plan for High-Priority Relationships (continued)

A. Organization	B. Individual	C. A Need or Issue that You Can Help With	D. Next Step With This Individual
4. Catalysts			
1.			
2.			
3.			
5. Collaborators			
1.			
2.			
3.			
6. Counselors			
1.			
2.			
3.			

Application Exercise One

Is Your Sale Stuck?

Identify a current sales conversation you're having, with either a new prospect or an existing client that is either "stuck" or not moving as fast as you think they should. Review each precondition for the sale and identify possible action steps to help the sales process move forward. Get into groups of two and share your challenge for this particular client opportunity.

Client Organization:				
Precondition	Yes	Not Sure	No	What action can you take to meet this precondition? What information do you need?
1. Clear, perceived problem or opportunity (sense of urgency)				
2. Your executive contact "owns" the issue and can move it forward				
3. Client has a dissatisfaction with the current rate of improvement				
4. Trusts you/your firm are the best choice to address the need				
5. Client believes the stakeholders are aligned				
6. Client sees tangible next steps to move forward				

Application Exercise Two

Develop Your Own Credibility-Building Questions

Credibility-building questions inherently demonstrate your knowledge and experience. They make an observation and then ask a question. For example, here's something I might say to a prospective client:

“Many of my clients encounter three major barriers to building trusted-advisor relationships with senior executives. First, the expert mindset that focuses you on the details rather than the client's overall business goals. Second, a misunderstanding about how to add “value for time” with senior executives. And third, too much telling and not enough high quality questioning and listening. I'm curious—what particular barriers do you encounter in your own organization?”

Develop a “credibility building question” that is appropriate for the area you work in and the prospective clients you are targeting. Write it in two parts, as indicated below. After everyone has finished, share your observation plus the “credibility building question” with your table group.

Part 1: Observation

Part 2: Credibility Building Question

Application Exercise

Describe Your Practice/Firm to Prospects

Part 1: Your Value Proposition

Articulate your value proposition—what you do for clients and the benefits you convey—in one sentence. For example, Andrew Sobel's is "I help companies and individuals build clients for life."

My value proposition:

Part 2: Describing Your Practice or Firm to Prospects

For you, what is the most effective way to answer the question, "Can you tell me about your firm?" or "How are you different?" Below, fill in what you think your key points of differentiation are and the examples you would use to bring them to life. (Remember that your points of differentiation may vary depending on the type of client you're talking to). Then list the major challenges you help clients with.

Key Differentiators	Client Examples or Other Illustrations that Support Them
1.	
2.	
3.	

Major Challenges: "I typically help my clients address one or more of several important challenges..."

Challenge 1:

Challenge 2:

Challenge 3:

Application Exercise One

Ensure Your Proposal Will Succeed

For a proposal you have been asked to submit or are working on, review each precondition, assess whether it has been fulfilled, and if not, what steps you can take to address it.

Name of Client:		
Precondition	Check if Present	Required Action
1. Right Client?		
2. A Well-Defined Issue?		
3. Clear Objectives?		
4. Value Has Been Defined?		
5. You Understand the Buying Process?		
6. You've Met the Economic Buyer/Executive Sponsor?		
7. Agreement on Proposal Outline? ("Conceptual Agreement")		
8. Scheduled a Time to Discuss the Proposal?		

Other steps you need to take to ensure this proposal will succeed:

Application Exercise Two

Turn Your Next Sales Pitch into a Collaborative Working Session

Review the different strategies in the left-hand column. For an identified sales pitch or sales presentation you have to make, choose the strategies that you should consider using to turn the meeting into a collaborative, value-added working session.

Area	Ideas for what to use or how to bring it to life
Illustrating with client examples	
Using thought-provoking questions	
Demonstrating your solutions and methodologies in an engaging way	
Using media (slides, charts, video, etc.) creatively	
Showing the composition of your team	
Educating the client: Creating learning during the presentation	
Entertaining the client: Making it fun	
Being truly memorable: Making sure you stand out from the crowd	

Application Exercise

Turn a Project into a Relationship

For a current client project or engagement, assess each key factor, below, and indicate a potential action step to address it if it's weak or lacking.

Name of client (individual):						
Current Project:						
Key Success Factors: Are They Present?	Rate Yourself (check one)					Required Action
	1	2	3	4	5	
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	
1. Relationship of trust with your immediate client						
2. High client satisfaction with the quality of delivery						
3. Client perceives significant value added						
4. You are interacting and communicating frequently with your client						
5. You are "agenda setting" with your client						
6. You've identified several potential follow-on opportunities						
7. You are following the selling process to create a buyer						
Additional steps you can take to turn this project into a relationship:						

Application Exercise One

Client Priority Assessment Checklist

Use this assessment worksheet to evaluate some of your clients. It lists a set of selection criteria that will help place clients in the different tiers on the following page.

Client Name:	Yes/#Points	No
1. The Right Client		
Fits your target client profile (industry, size, location, etc.)	2	0
Willing/able to invest in your full suite of products/services	2	0
Good name which will enhance your own reputation	1	0
Treats service providers/vendor well	1	0
Has a history of building long-term relationships	1	0
Has a bias for action so your work will have an impact	1	0
2. The Right Issue		
Important for the client—it's a priority	2	0
In your "sweet spot"—you have strong competence	2	0
Opportunity to learn and deepen your experience	1	0
You can achieve meaningful results	1	0
3. The Right Executive		
Is authorized to decide and act	2	0
Capable and confident	1	0
Enjoys the support of their broader leadership	1	0
Motivated and ambitious	1	0
Is loyal and will give others credit	1	0
Treats you with personal respect	1	0
4. The Right Financials		
Meets or will shortly meet benchmark for profitability	3	0
(Total Possible Points)	24	
TOTAL POINTS FOR THIS CLIENT		

Evaluation: 19–24 points: Probably Tier A 12–18 points: Probably Tier B Less than 12: Probably Tier C

Application Exercise Two

Evaluate your Clients by their Growth Potential and Overall Importance

Based on what you learned from the **Client Priority Assessment Checklist** on the previous page, sort each of your clients into Tier A, B, or C. What actions does your tiering suggest you need to take?

Tier A: Invest

These are clients that have the highest potential to grow or that you need to invest in to maintain and protect.

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Tier B: Maintain

These are good, solid clients that are your “bread and butter.” Some of these may evolve into Tier A clients.

- | | |
|----|-----|
| 1. | 7. |
| 2. | 8. |
| 3. | 9. |
| 4. | 10. |
| 5. | 11. |
| 6. | 12. |

Tier C: Evaluate and Prune or Promote

These are client relationships that have an uncertain future and may be a drain on your resources. You need to decide whether to prune or wind them down gradually; or to restructure/reframe the relationship so it can become a Tier B client.

- | | |
|----|----|
| 1. | 5. |
| 2. | 6. |
| 3. | 7. |
| 4. | 8. |

Application Exercise

Develop Your Top Executive Relationships

Pick two senior executives with whom you would like to build or deepen a relationship. If possible, have one be an executive with whom you have an existing relationship at a current client and the other should be a new executive who works with either an existing or new client organization and with whom you do not currently have a relationship. Complete the worksheet on the next page, listing what you know about the client's agenda of key priorities, ideas to gain access, and so on.

	Senior Executive 1	Senior Executive 2
Name		
Company		
His or her agenda (Major goals or priorities)	1. 2. 3.	1. 2. 3.
How can you gain access?	1. 2. 3.	1. 2. 3.
How can you add value for time?	1. 2. 3.	1. 2. 3.
Action steps to build this relationship	1. 2. 3. 4.	1. 2. 3. 4.

Application Exercise

How Well Do You *Really* Know Your Clients?

Client name:

THE BASICS					
As a Person			As a Professional		
Level of Knowledge			Level of Knowledge		
Needs work	Good		Needs work	Good	
		Spouse/partner, children			Preferred means of communication (e-mail, phone, face-to-face, etc.)
		Other family: parents, siblings			Work style (early/late, weekends, etc.)
		Educational background			Personal assistant: background, interests
		Where he/she grew up			Career history: accomplishments, positions held
		Interests outside of work			Professional and alumni associations
		Favorites: restaurant, author, movie, vacation, etc.			Conference participation

Application Exercise
How Well Do You *Really* Know Your Clients? — continued

DEEPER KNOWLEDGE					
As a Person			As a Professional		
Level of Knowledge			Level of Knowledge		
Needs Work	Good		Needs Work	Good	
		Formative life experiences			Strengths and weaknesses as an executive
		Personal issues he/she may be grappling with			Role models, mentors
		Non-profit or charitable involvement			Career goals and aspirations
		Personal style: introvert vs. extrovert; detail oriented vs. focused on the big picture, etc.			Most concerning issues right now
		Risk tolerance			Quality of relationship with his or her boss
					Relationships with key direct reports (do you know them?)
					Corporate directorships, other affiliations
					Other executives he/she associates with
					Most important networks and relationships

Application Exercise One

Institutionalize Your Client Relationships

Pick a major (or potentially major) client relationship that you feel can be more effectively institutionalized. Rate each strategy in terms of the opportunity to improve where 1=already doing very well and 5=this is a significant opportunity to improve. List any action steps you'd like to take.

Client	Opportunity to Better Institutionalize this Relationship?					Action Step?
	1	2	3	4	5	
	1 Already doing very well			5 Significant opportunity to improve		
1. Expand your client network: Build many-to-many relationships						
2. Strengthen your internal network: Deepen key relationships within your firm						
3. Broaden the client's perception of your capabilities						
4. Improve and intensify your client relationship management						
5. Improve your team management						

Application Exercise Two

Rate Your “Institutionalization” Behaviors

Using the worksheet below, rate yourself in terms of how often you engage in these institutionalization strategies with you clients.

Effective Behaviors to Institutionalize Client Relationships	Rate yourself: How often do you engage in each of the behaviors?				
	1				5
	Rarely				Nearly Always
	1	2	3	4	5
1. My account plans include a relationship-building plan to create multiple levels of contact between my firm and the client.					
2. Every team member is assigned one or more relationships to develop, and we monitor progress against their goals.					
3. We have developed a strong network of relationships with key buying influences in the client’s organization, including senior economic buyers.					
4. I personally have a broad network within my own firm, and I know where to go to find the right resources for my client.					
5. I ensure that my client is exposed to my firm’s full set of capabilities.					

Application Exercise

Add More Value

For a current client, review the list below and identify possible action steps for each value strategy. Think about how well you're currently doing in each area, and what you could do to improve.

Name of Client:	
Value Strategy	Possible Action Steps
1. Effectively communicate the current value added	
2. Increase client interaction and dialogue to better understand their needs	
3. Add more personal value to your client	
4. Add surprise value: Provide insight into other issues and problems	
5. Add "intangible" value (e.g. around teamwork, motivation, decision making, risk, etc.)	
6. Leverage your firm and/or your network to provide: <ul style="list-style-type: none"> • Relationship Leverage • Organization Leverage • Network Leverage • Market Leverage • Innovation Leverage • Technology Leverage 	

Application Exercise

Become a Thought Leader

- Describe the topic(s) or client challenge(s) around which you would like to deepen and grow your thought leadership:

- Assess your current thought leadership:

	1	2	3	4	5
My Thought Leadership Is:	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1. Highly relevant to my clients and other key stakeholders.					
2. Original rather than re-rehashed or recycled.					
3. Available to my clients through a variety of media and channels.					
4. Visible in the marketplace to clients and others who are researching or searching for my area of expertise.					
5. Rule-Making in that it defines the subject and its key dimensions—perhaps even the vocabulary people use to describe it.					

Application Exercise

Become a Thought Leader—continued

3. What platforms or channels do you use today to disseminate your thought leadership? Which ones do you want to develop in the future?

Thought Leadership Platform	Current	Future	Next Step
1. Conceptual frameworks (e.g. 2x2 matrix, five step process, etc.)			
2. White papers			
3. Best practice checklists			
4. Commercial articles			
5. Firm publications			
6. Blogging			
7. Website content			
8. Weekly/monthly newsletter			
9. Teleseminars, webcasts			
10. Video (e.g. Youtube, Vimeo, etc.)			
11. Podcast			
12. Social media updates (e.g. LinkedIn, Facebook, Twitter)			
13. Book chapter			
14. Book			
15. Ebook			
16. Special reports			
17. Keynote speech			
18. Conference participation (panel, etc)			
19. Research study or survey			
20. Academic collaboration			
21. Press release (e.g. research results, etc.)			
22. Others			

Review your worksheet for question 3, above. What are your three key priorities for the next six months?

- 1.
- 2.
- 3.

Application Exercise

Choosing Multiplication Strategies for a Client

Choose a client that you feel is a good candidate for one or more “multiplication” strategy. Review the list, below, and check the ones you think are most promising. Then, write a potential action step in the right-hand column for the highest-potential ones.

Client Name:	High Potential Strategy for this Client?	
Multiplier Strategies	(Check the Box)	Action Step to Explore this Strategy
Testimonials (Written)		
Testimonials (Video)		
Joint Intellectual Capital Development (e.g. co-author an article)		
Referrals		
Personal networking		
Joint account planning		
Certification		
Seconding (lending an employee to the client)		
Client communities		
Business partnerships		
Advocacy programs (e.g. awarding “hall of fame” status)		
Other		

Application Exercise

Are You Developing into a Person Of Interest?

Read through the description of each characteristic. Does it fit you? Mark 1, 2, 3, 4, or 5 based on the extent to which you Disagree or Agree with the description as it applies to you right now.

"Person of Interest" Strategies	1	2	3	4	5
	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Deep Generalist: I am a Deep Generalist who combines strong knowledge depth in my core specialty with wide knowledge breadth. I comfortably discuss broader business issues with my client that extend beyond the specific engagement I'm hired for.					
Thought Leadership: My clients view me as a thought leader in my specialty—someone who brings strong ideas, frameworks, and perspectives around an area of their business. I have or am building broader marketplace renown in my field.					
Marketplace Crossroads: I actively talk to many people in and around my market, and my clients consider me a source of interesting, relevant, and current information.					
Personal Interests: I have cultivated my own personal interests and passions and am able to have vibrant conversations with my clients about both mine and theirs.					
Eclectic Network: I have built a network of interesting and diverse individuals who are accomplished in their own fields.					
Mastery Through Deliberate Practice: I intentionally build my professional mastery and skills through intentional practice: including repetition, isolation of areas I need to improve, and objective feedback.					
Other					