The eLearning program roadmap: Building Your Clients for Life

Challenge One: Become a Trusted Advisor

1. Building Clients for Life
- 1.1 What clients really want
- 1.2 Assess your relationships
- 1.3 Evolve from an expert for hire to a client advisor

2. Agenda Setting
- 2.1 Become a proactive agenda setter
- 2.2 Barriers to agenda setting
- 2.3 Use agenda setting strategies

3. Trust
- 3.1 Understand the essence of trust
- 3.2 Accelerate trust
- 3.3 Avoid trust busters

4. Empathy
- 4.1 Test your empathy
- 4.2 Become a great listener
- 4.3 Avoid listening pitfalls

Challenge Two: Deepen Trusted Advisor Skills

5. Power Questions
- 5.1 Develop your own power questions
- 5.2 Winning the sale
- 5.3 Deepening relationships

6. Selfless Independence
- 6.1 Harness the power of No
- 6.2 Develop 3 types of independence
- 6.3 Strategies for selfless independence

7. Big Picture Thinking
- 7.1 The Foundations
- 7.2 Tools and techniques for synthesis
- 7.3 Habits of mind

8. Deep Generalist
- 8.1 Master three levels of learning
- 8.2 Build four levels of client understanding
- 8.3 Become a lifelong student

Challenge Three: Build a Powerful Network

9. Relationship Capital
- 9.1 Build your personal brand
- 9.2 Identify the critical few
- 9.3 Develop 6 types of relationship capital

10. Managing Your Total Network
- 10.1 Identify the middle few and the many
- 10.2 Implement a staying-in-touch plan

Challenge Four: Create Buyers

11. Contact to Client
- 11.1 Understand the 6 preconditions to buy
- 11.2 Recognize 4 types of sales meetings
- 11.3 Build rapport
- 11.4 Establish your credibility
- 11.5 Uncover their issues and exlore the need
- 11.6 Get a next step

12. Tough Client Objections and Questions
- 12.1 Use objections to engage
- 12.2 Turn tough questions into opportunities

13. Winning the Pitch
- 13.1 8 Preconditions to write a proposal
- 13.2 Lay the foundations for a successful pitch
- 13.3 Create a collaborative working session

Challenge Five: Grow Your Client Relation-ships

14. Project to Relationship
- 14.1 Deliver on your promises
- 14.2 Build the foundations for growth
- 14.3 Create a repeat buyer

15. Growth Strategies
- 15.1 Select the right clients to grow
- 15.2 Make strategic investments
- 15.3 Leverage growth catalysts

16. Account Planning
- 16.1 Ask 8 key questions
- 16.2 Establish an account planning process
- 16.3 Understand why account planning fails

17. C-Suite
- 17.1 Walk in their shoes
- 17.2 Gain access
- 17.3 Add value for time

18. Personal Relationships
- 18.1 Get to know your clients as people
- 18.2 Use nine strategies to connect
- 18.3 Avoid the pitfalls of getting personal

Challenge Six: Multiply Your Client Relation-ships

19. Institution-alizing Rela-tionships
- 19.1 Strengthen your client network
- 19.2 Strengthen your internal network
- 19.3 Intensify relationship management

20. Adding More Value
- 20.1 Understand the dilemmas of value
- 20.2 Use five value-adding strategies
- 20.3 Leverage your firm

21. Becoming a Thought Leader
- 21.1 What is thought leadership?
- 21.2 Use three sources of thought leadership
- 21.3 Broadcast your ideas

22. Multiplying Relationships
- 22.1 Capture long-term relationship benefits
- 22.2 Select multiplication strategies

23. Becoming a Person of Interest
- 23.1 Six strategies to earn a seat at the table
- 23.2 Improve with deliberate practice

Challenge Seven: Solve Tough Relation-ship issues

24. Sales Challenges
- 24.1 Move from the feasibility to the economic buyer
- 24.2 Unseat an incumbent
- 24.3 Build relationships with procurement
- 24.4 Manage discount pressure

25. Relationship Growth Challenges
- 25.1 Connect with clients who don't want a relationship
- 25.2 Build your own relationships in a firm
- 25.3 Broaden the client's perception of your capabilities
- 25.4 Move up in the organization

26. Trusted Advisor Challenges
- 26.1 Connect with a client older than you
- 26.2 Ask for referrals
- 26.3 Manage a crisis or service failure
- 26.4 Act like an advisor while being a deep expert
- 26.5 Stay in touch when there's no business
- 26.6 Make time for relationship building

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