Building Your Clients for Life

The most comprehensive eLearning program in the world to help you become a trusted client advisor and build clients for life

The Challenge

Client Relationships Are More Important Than Ever

But they're also harder than ever to build and sustain

Client sophistication, increased competition, and the use of procurement mean there is a greater need than ever to improve client acquisition and client development skills. Trusted client relationships are one of the few remaining competitive advantages that cannot be rapidly imitated. Classroom training alone, however, cannot meet this need. Traditional training is costly—especially for geographically dispersed professionals—and as a one-off event it doesn't change ingrained behaviors.

A Proven Solution

Andrew Sobel's Comprehensive eLearning Program

This is a unique, portable learning experience that is based on the most extensive research ever done on the ingredients of long-term client relationships. It can help your client-facing professionals win new clients, grow existing relationships, and acquire the trusted advisor skills they need to earn a seat at the table. When integrated with virtual live events, small accountability groups that meet regularly, and live training, it can have a powerful impact on revenue growth.

- 82 Audio Lessons (8 ½ hours)
- 37 HD Videos
- 177-Page Workbook
- Trusted Advisor Online Assessment

"Andrew Sobel's techniques have been instrumental to building our 'client first' culture at Cognizant."

—Francisco D'Souza
CEO, Cognizant

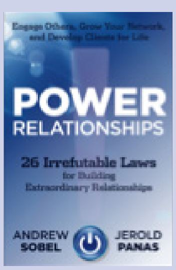
"It has provided a comprehensive training solution that meets the unique needs of our nationally-dispersed team of Human Capital Consultants. We have seen positive, tangible results…We highly recommend this program."

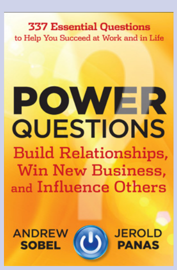
—Morgan Massie
Human Capital Talent Manager, TriNet

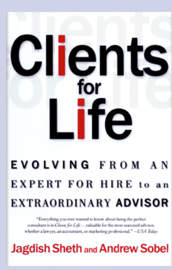
Andrew Sobel

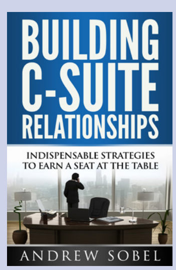
The Leading Authority on Building Clients for Life

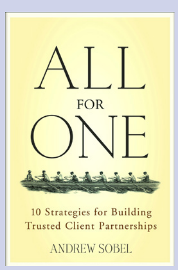
"This eLearning program contains the most powerful relationship-building strategies and techniques that I've learned while conducting 20 years of research and writing seven bestselling books on the ingredients of long-term client relationships."

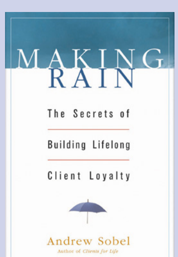








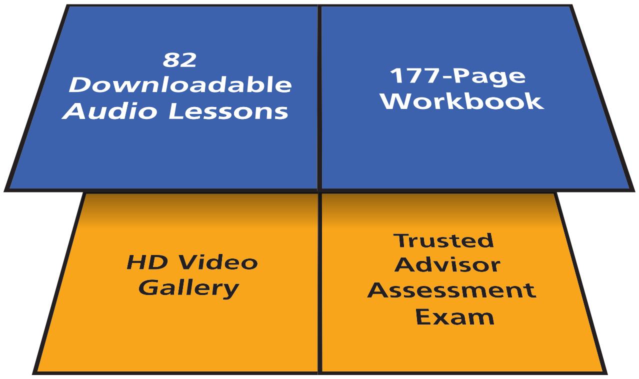




Dramatically Accelerate Client Relationship Growth

With leading-edge content, this program helps strengthen the relationship-building skills you need to grow your client base—at a fraction of the cost of traditional training.

Building Your Clients for Life utilizes four powerful methods to maximize learning. It employs a unique delivery process that harnesses internal champions and peer accountability groups.



Participants report greater confidence and skill at all phases of client development, including:

- Consistently winning more new clients
- Growing existing relationships
- Institutionalizing client relationships
- Shifting from an "expert for hire" to a client advisor role with executives
- Moving up in the organization

Who is *Building Your Clients for Life* for?

- Account Executives
- Key Account Managers
- Partners and Managers
- Salespeople
- Client Relationship Managers
- Business Development Executives
- Client Service Officers
- …Any client- or customer-facing professional

Course Roadmap: 82 Downloadable Lessons

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 Relationships

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 Relationships

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 Relationship 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
- 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

Learn On-the-Go, Anywhere

The audio lessons can be streamed or downloaded.

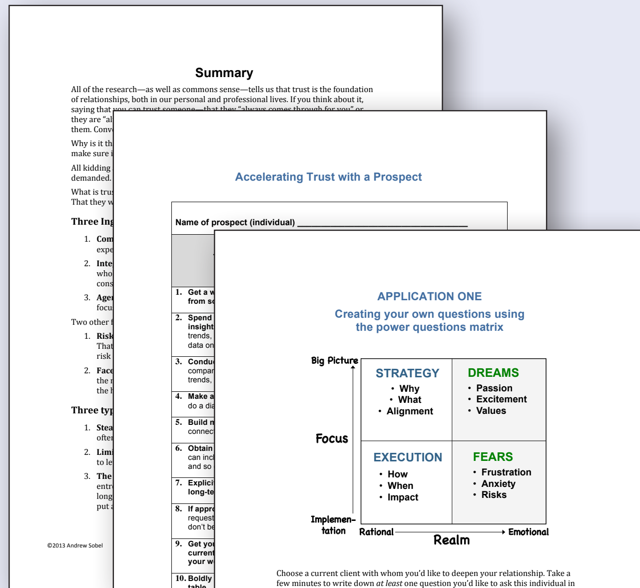
- 82 audio lessons—8 ½ hours total
- Five to nine minutes each
- Downloadable to smartphones/tablets


Client Relationships Re-Imagined
82 songs, 8 hours 30 minutes

	✓	Name	Time	Artist
1	✓	1.1 What Clients Really Want	11:25	Andrew Sobel
2	✓	1.2 Assess the Strength of Your Relationships	6:29	Andrew Sobel
3	✓	1.3 Evolve from an Expert-for-hire to a Client Advisor	8:29	Andrew Sobel
4	✓	2.1 Be a Proactive Agenda Setter	6:21	Andrew Sobel
5	✓	2.2 Overcoming Barriers to Agenda Setting	8:29	Andrew Sobel
6	✓	2.3 Use Agenda Setting Strategies	6:12	Andrew Sobel
7	✓	3.1 Understand the Essence of Trust	6:21	Andrew Sobel
8	✓	3.2 Accelerate Trust	6:12	Andrew Sobel
9	✓	3.3 Avoid Trust Busters	4:36	Andrew Sobel
10	✓	4.1 Test Your Empathy	4:57	Andrew Sobel
11	✓	4.2 Become a Great Listener	5:15	Andrew Sobel
12	✓	4.3 Avoid Listening Pitfalls	8:20	Andrew Sobel
13	✓	5.1 Develop Your Own Power Questions	8:42	Andrew Sobel
14	✓	5.2 Use Power Questions to Win the Sale	4:41	Andrew Sobel
15	✓	5.3 Use Power Questions to Deepen Relationships	7:17	Andrew Sobel
16	✓	6.1 Harness the Power of No	7:26	Andrew Sobel
17	✓	6.2 Develop Three Types of Independence	6:32	Andrew Sobel
18	✓	6.3 Strategies to Develop Selfless Independence	5:22	Andrew Sobel
19	✓	7.1 Get the Foundations in Place	6:39	Andrew Sobel
20	✓	7.2 Learn Tools and Techniques for Synthesis	11:56	Andrew Sobel
21	✓	7.3 Adopt the Right Habits of Mind	7:03	Andrew Sobel
22	✓	8.1 Three Levels of Personal Learning	5:38	Andrew Sobel
23	✓	8.2 Four Levels of Client Knowledge	5:10	Andrew Sobel

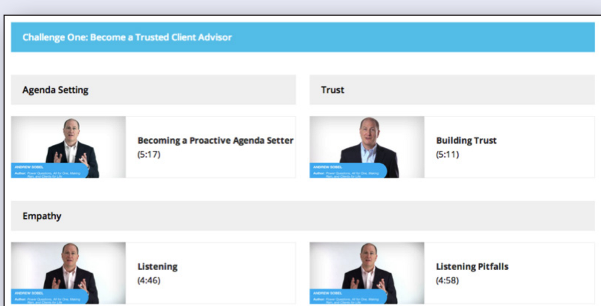
Apply the Strategies

The 177-page workbook summarizes every Session and contains 28 application worksheets.



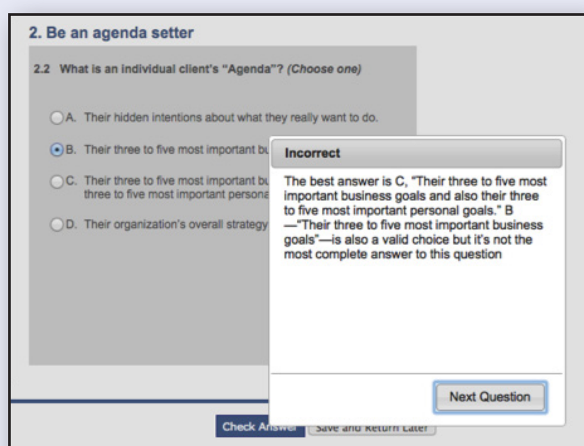
Watch Summary Videos

- 37 high-definition, 5-minute videos (nearly three hours of video)
- Each video provides a quick but thorough overview of the topics that are covered in-depth in the audio program
- Meets three learner needs: younger professionals who like video; participants who want a quick catch-up on a topic; and individuals who do not speak English as a first language



Take the Trusted Advisor Assessment

- Online assessment can be used for certification
- Over 100 multiple-choice questions covering 23 topics
- Five client case studies
- Group and individual scoring and reporting
- Structured for "Testing as Learning"—wrong answers are flagged and text explains the correct answer



A Program Can Integrate Multiple Learning Interventions for Maximum Impact

Scalability can be achieved using the eLearning program with monthly, small group meetings, live webcasts, and targeted training workshops.

A live or virtual training event serves as the kick-off to the learning process

Virtual Live Events

Virtual Live Events

Internal champions facilitate local, monthly discussion meetings

Before each meeting, participants:

- Listen to audio lessons/watch videos
- Complete application exercises
- Review workbook as needed

Groups meet regularly, led by internal champions, to share success stories, discuss lessons, and apply the strategies to their own client relationships

Trusted Advisor Online Assessment

The Assessment tests comprehension and reviews the content

What Others Are Saying

Building Your Clients for Life has been adopted by leading companies such as Citibank, TriNet, and Cognizant.

"It provides a comprehensive training solution that meets the unique needs of our nationally-dispersed team of Human Capital Consultants. Based on Andrew Sobel's best-selling books, it chunks the information into small, easily digestible, yet very informative audio lessons that our team can 'carry' with them as they travel and/or prepare for client meetings. We highly recommend this program."

—Morgan Massie
Human Capital Talent Manager
TriNet

"His deep expertise on what makes service firms successful makes Andrew Sobel's guidance accessible, credible, and invaluable."

—Edward E. Nusbaum
Chief Executive Officer
Grant Thornton International

"With exceptional video and audio elements, it's like having a coach by your side 24/7. The program has yielded significant, fruitful results for our firm."

—Mabry Smith III
President
Wheless Partners Executive Search

Please call or email Andrew to discuss how this and other learning solutions can help you meet your own revenue growth goals.

You can read more about the program and enjoy sample lessons at www.andrewsobel.com/elearning

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Recent Feedback from eLearning Program Participants

(Note: Several different companies who are clients for the program collected these comments from their own people who are participating. They are representative of the feedback we've been consistently receiving from others as well)

- "The short-lesson format is very powerful. They are easy to follow and I love the fact that it's mobile and you can download them to your iPad and phone. I have actually been going through the other lessons that are not on the required list. I've been listening while commuting to work, when I would normally be doing nothing! It's a great way to learn."
- "They all think the program is valuable and that it provides good tools to implement concepts that, though known in some cases, are difficult to apply. They also said the lessons helped them to better organize their activities and priorities with clients."
- "Very good participation from the team. The training is very easy to follow. Andrew speaks with a very nice and easy manner that is pleasant to listen to—even late at night! We agreed that it does not come across as a 'lesson,' but as a friend giving us suggestions and using lot of good examples to illustrate them. The fact that lessons are short, makes them easier to attend and listen to."
- "Overall feedback on the program is very positive and many of the members were pleasantly surprised how much they liked it [to be honest!]. Good format – small 'snippets' for the lessons/exercises are very manageable. Audio lessons also short to keep your attention, and also conversational and anecdotal keep them interesting as well. Very good content, and I like our small-group discussion to hear others' experiences and suggestions and also to improve our internal networking."
- "Good discussions within our small group on the quality of the podcasts. Everyone agrees it is best to listen with a pen in hand to take notes. Many in the group are seasoned salespeople and they see great value in the way Andrew's sessions help formalize their experience and relationship building skills."
- "At the beginning I was skeptical—will this really work for me? But I found that the format, with short lessons supported up by the summary eBook, is great for me. The frameworks are very practical and backed up with real examples."
- "My observations from the training are that the significance of bringing these groups together on a monthly basis can't be lost. I have found that my team is increasingly engaged in conversation and trusting of each other for support,

suggestions and input. By creating a relevant and risk free environment, we are discussing both our successes and failures and gaining additional perspectives…I also have noted that we are applying many of the topics not only to successful client relationships but internal constituents as well. Many of the issues that we face related to clients are equally or more challenging when dealing with the same behaviors internally."

- "We've been having great dialogues in our small group and everyone has been fully engaged. It facilitated an engaging discussion and the feedback was exceptionally positive. I personally thought it was brilliant and thoroughly enjoyed listening to the individual sessions and the great discussion in the team forum."
- "I really enjoyed the format. This is the first time I've done this type of mobile learning and I am able to do it while commuting to and from work. The other thing I really liked was having a constant flow of information and ideas, almost on a daily basis. The workshop we did together was great and very impactful, but it ended. The lessons keep going—I've listened to some of them twice—and they are a constant reminder for me to get better and push myself."
- "Workbook, audio lessons, videos, and examples are good and applicable. I've listened to the audio a few times. Instead of just presenting during client meetings due to time constraints, I'm learning to ask questions and dive deep into what clients really requires."
- "My team is realizing that our sales role has to evolve into a different approach. Agenda setting, active listening, preparing in anticipation for the meeting and tailored, power questions continue to pop in every call. As a new item, we implemented what we call a 'sharing space,' which is sending an email after our group call…Often, we learn by observing and following examples from other's work."
- "The group participants like the audio lessons very much. You always illustrate your points with examples and actual stories, which brings the ideas to life. The five- to eight-minute length of the lessons is perfect. While I'm in my car I can often listen to two or three of the—the format enables me to use my spare time much more effectively."
- "I liked the mobility of the program. I also liked the short length of the lessons—I have a short attention span myself and they are just right. I also enjoy being able to choose which lessons I listen to on any given day, depending on what particular client challenges I am dealing with."