

Are You Creating a Personal Promoter?

This self-assessment is designed to help you understand how well you are engaging in the specific actions that create a true promoter—a client for life who will actively promote you and your firm to colleagues and friends.

Please answer these questions as they apply in general to your client relationships.

I. Understanding your client’s agenda I have:	
Developed a full understanding of their <u>business</u> agenda—their 3-5 most important professional priorities, needs, or goals.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Developed a full understanding of their <u>personal</u> agenda—their 3-5 most important personal priorities, needs, or goals.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Held regular “agenda setting” conversations (e.g., 2-4 times a year) to further my understanding of their plans and goals and bring new ideas and perspectives to add value to and challenge their agenda.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
II. Developing a personal relationship with your client. I have:	
Created both social and professional opportunities to interact with them outside the office.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Shown deep curiosity about them and taken an interest in them and their interests.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Used thoughtful questions to get to know them better.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Been willing myself to also share and disclose on a personal level.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Gone above and beyond to help them during a crisis or challenging time.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
Invited them to my home, or been invited to theirs, for dinner or a social event.	Never 1 Rarely 2 Sometimes 3 Often 4 Always 5
III. Helping your client succeed at work and in life. I have:	
Executive Leadership: Helped them become a better executive and leader.	Never Rarely Sometimes Often Always

<p>(E.g., given regular coaching to handle difficult management challenges)</p>	<p>1 2 3 4 5</p>
<p>Career Given them ideas and suggested opportunities to enrich their career. (E.g., referred attractive job opportunities or helped them strategize how to reach their next goal)</p>	<p>Never Rarely Sometimes Often Always 1 2 3 4 5</p>
<p>Learning Contributed to their learning and helped sharpen their knowledge and skills. (E.g., given them curated articles and books that align with key interests, or provided significant learning experiences through firm events and activities)</p>	<p>Never Rarely Sometimes Often Always 1 2 3 4 5</p>
<p>Team Advised on how to develop, lead, and get the most out of their team. (E.g., shared observations about their team’s development needs, described the gap between where they are today and where they need to be, and made recommendations for improvement)</p>	<p>Never Rarely Sometimes Often Always 1 2 3 4 5</p>
<p>Network Added “network value” by introducing them to valuable, relevant contacts (mine or the firm’s). (E.g., introduced them to a peer at another company who is facing similar challenges or who was also recently promoted to the same role)</p>	<p>Never Rarely Sometimes Often Always 1 2 3 4 5</p>
<p>Family Helped them with family-related challenges and interests.</p>	

(E.g., gave advice to a child on careers, helped a newly-relocated family find the right schools, or helped a child get summer or full-time employment)	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
Community & Nonprofit Taken an interest in and helped facilitate their community and nonprofit interests. (E.g., donated to their favorite nonprofit cause, introduced them to someone who helped them become a trustee of a prestigious nonprofit organization)	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
Personal Priorities & Aspirations Added value to their personal agenda. (E.g., helped them in their pursuit of a special hobby or interest by providing unique information or access)	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
IV. Maximizing the client's perception of our firm's core value. We have:					
Regularly assessed and communicated the value you have added, including both quantitative and qualitative value.	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
Influenced them to give positive, public reviews and endorsements of your work across their organization.	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
Gained opportunities through your client to expose other areas of the organization and levels of management to your work.	Never 1	Rarely 2	Sometimes 3	Often 4	Always 5
TOTAL SCORE (minimum 20, maximum 100)					