

**ANDREW SOBEL'S** Building Relationships That Matter

Slides and Application Worksheets  
for Using Power Questions and  
Becoming an Agenda Setter

**Ernst & Young FAAS Managers Conference**

September 23, 2019

# Agenda Setting Worksheet

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.

## Instructions

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.

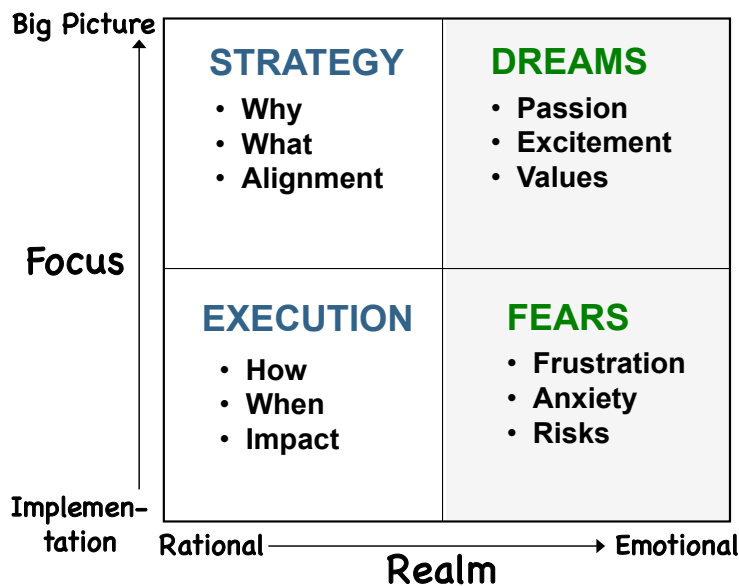
<p>Name of client company:</p> <p>_____</p> <p>Name of individual:</p> <p>_____</p>	<p>Date of meeting: _____</p>
<p>What actions can you take to introduce agenda setting into this meeting in order to either more firmly connect the discussion to the client's key goals and/or to showcase new ideas and perspectives?</p> <p><i>Ask:</i></p> <ol style="list-style-type: none"> <li>1. How can I elevate the discussion beyond a review of project execution or the status of my milestones?</li> <li>2. How could I bring some new ideas or perspectives to the session?</li> <li>3. 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?</li> <li>4. What thought-provoking questions can I ask?</li> </ol>	
<p>Action 1:</p>	
<p>Action 2:</p>	
<p>Action 3:</p>	
<p>Action 4:</p>	

# Power Questions Worksheet

## Instructions

In this exercise, you'll develop questions, in four areas, to ask a key client executive you are working with.

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.



**Strategy** (e.g., “Why have you decided to pursue this particular program?”)

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**Execution** (e.g., “How will this impact your customer service?”)

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

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

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## Checklist: Fifteen (at least) Different Uses of Power Questions

1. **Focus the conversation:** “From your perspective, what’s the most important issue we should be discussing this morning?”
2. **Understand their agenda and high-level goals:** “Why are you...?” “What key goals or accomplishments will you personally be evaluated on at the end of the year?”
3. **Test for urgency:** “Where would you position this among your priorities right now?” “What is your timing to act on this?”
4. **Determine value:** “What is the value of fixing this right now?” “When fully realized, how much do you estimate this opportunity is worth?”
5. **Enable self diagnosis:** “How would you rate the level of collaboration in your department on a scale of one to five?” “In determining compensation, would you say you are more focused on internal equity or market equivalence? Which end of the scale are you moving towards, and why?”
6. **Understand personal impact:** “How will this initiative impact your own role and set of responsibilities?”
7. **Increase personal understanding:** “You’ve been in this business for over 20 years now...I’m curious, how did you get your start?” “You’ve achieved a great deal in your career—is there still something you’d like to accomplish?”
8. **Gain commitment:** “What options are you considering? What are you leaning towards? What would enable you to make a final decision?”
9. **Identify desired behavior change:** “As you look at how your people are dealing with this challenge, what specific things do you wish they would do differently or better?”
10. **Broaden the canvas:** “Can you tell me about some of the interdependencies in your organization? For example, how will the success of this depend on X, Y, or Z?”
11. **Reframe:** “What are other contributing factors to this problem?”
12. **Challenge:** “I’m curious, how did you decide upon 8% as a goal? Some of our clients have achieved 10-15%.”
13. **Tap into emotion and passion:** “As you look at all of your initiatives, what are you personally most excited about?” “What legacy would you like to leave here?”
14. **Identify stakeholders:** “Who are the key stakeholders in your organization who will have a role in this?”
15. **Learn about relationship habits:** “I’m curious, who have been your most trusted advisors or service providers, and how did they earn that position with you?”

# Building the Relationships that Matter—with Your Clients and for Your Career

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## Some core principles

Follow the person not the position

Build your network before you need it

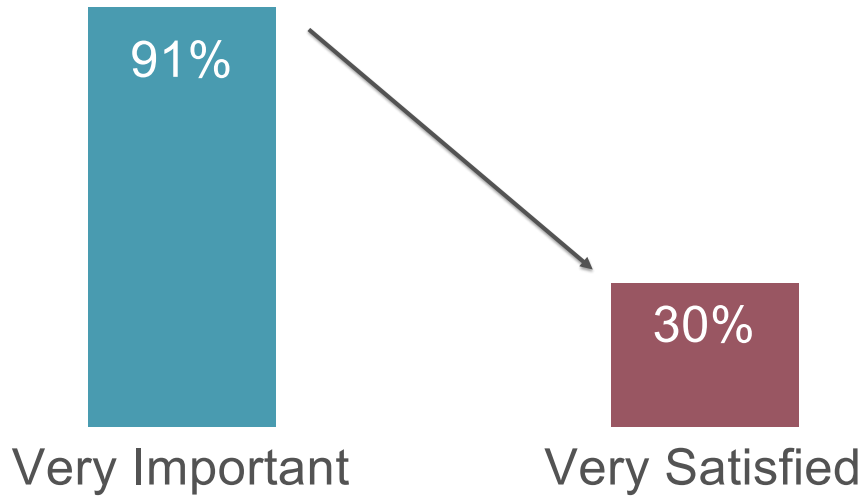
Great relationships are based on great conversations—not one person showing the other how much they know

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## Relationship importance versus satisfaction



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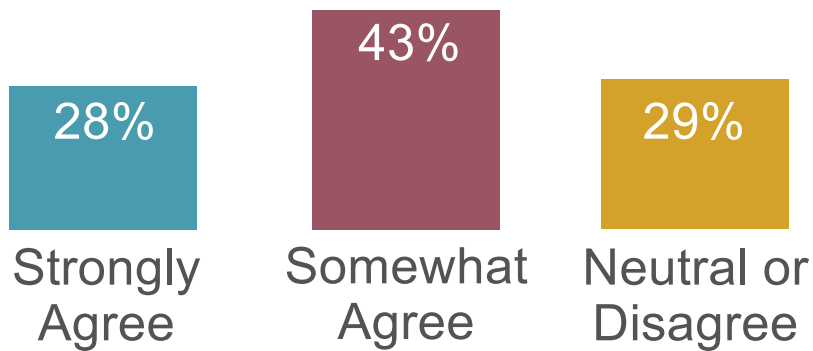
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## How much effort are we putting in?

“I am able to make time to invest in building long-term professional relationships.”



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Skills participants wanted to most improve

Influencing and Persuading

Asking Good Questions

Listening

Resolving Conflict

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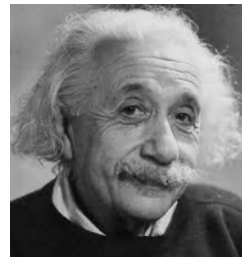
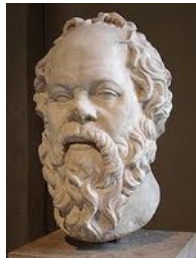
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## Using Power Questions

1. Open-ended
2. Surprising
3. Focus on right issues
4. Uncover the agenda
5. Identify root cause
6. Explore full context
7. Build personal knowledge



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# Three essential questions for client development

1. What are your aspirations for...?

2. What is the gap...

3. What capabilities do you need to develop...



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# The Power Questions Matrix



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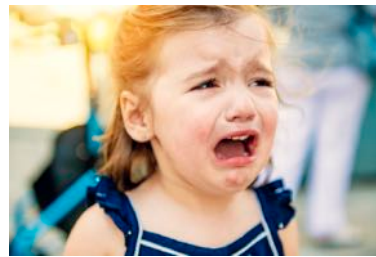
## Overused questions

For example:

**“What’s keeping you up at night?”**



**“What will success look like?”**



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## Becoming an agenda setter

**The Agenda: Your client’s 3-5 most critical needs, priorities, or goals**



**REACT** → **ANTICIPATE**

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# Going deeper into your client's planning cycle

Goals & Strategies



Tactical Programs



Solutions



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# Reframing client issues

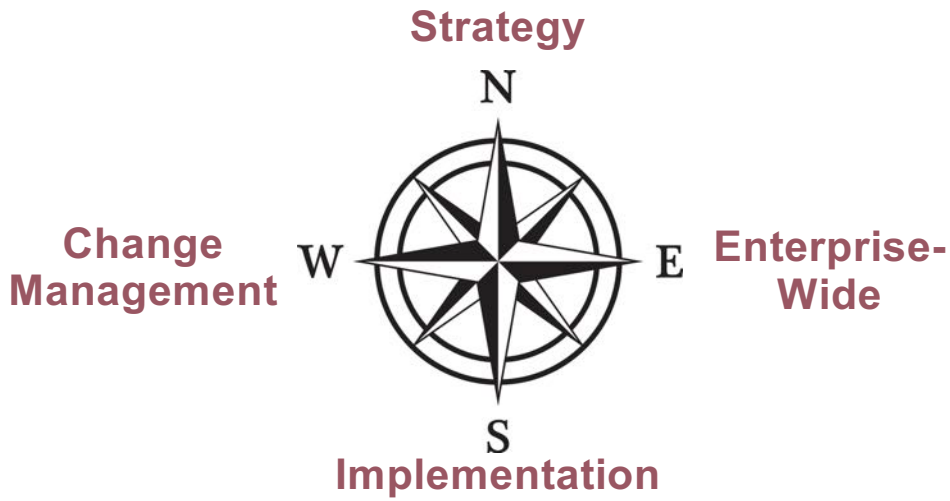


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# The compass method



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# Relationship conflicts

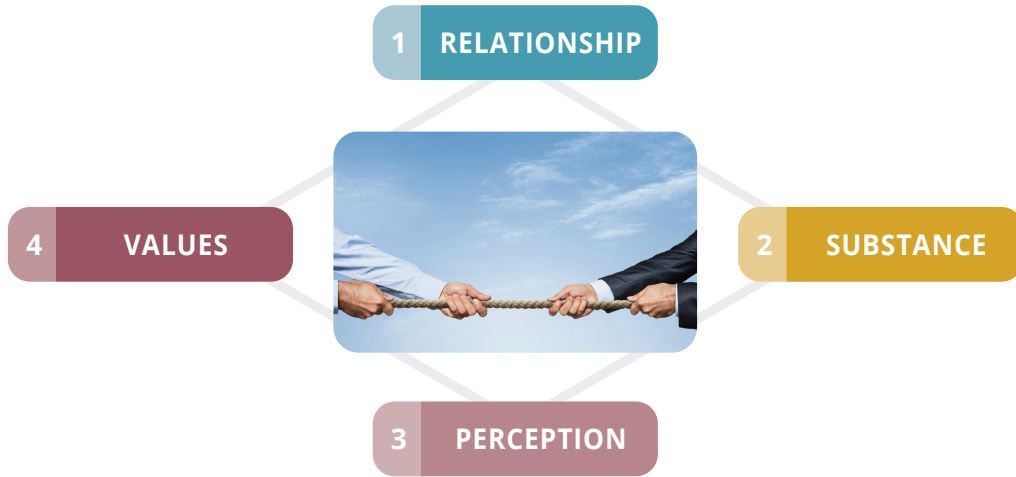


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# FOUR SOURCES OF CONFLICT



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# HEALING RELATIONSHIPS



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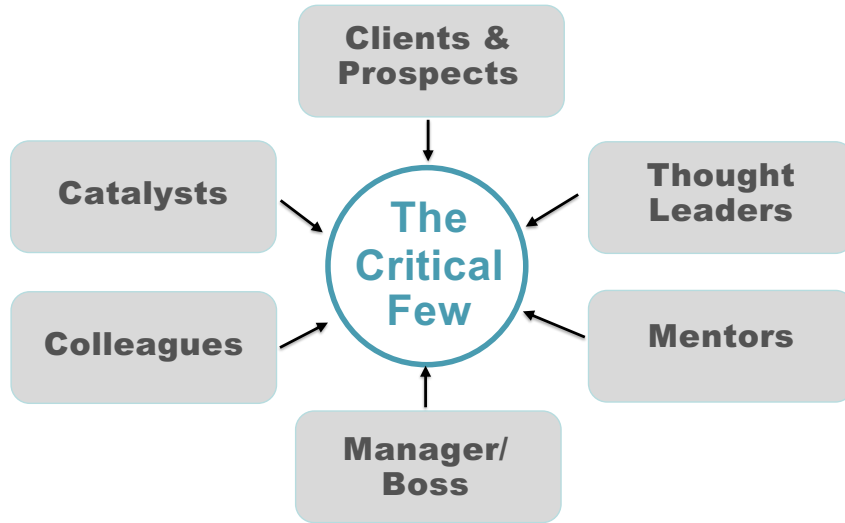
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# Your Success Network



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