

Must-Do Tips No 35: Professional Client Discussions Part 1

The core of any good business relationship is being able to talk to clients. REALLY talk to them. Not just about transactional stuff, or about the weather or football. But about the business things that matter to them. Because if we can engage them at this level, we find out so much more about what they might need from us, as advisers. Unfortunately, some professionals we have met are either oblivious to this level of operation, or think that they do it already so don't need to bother. For both types, we offer three things that will assist in preparing the ground for a productive interaction. In Part 2, we will cover what needs to go into the meat of a good conversation.

Tip 1 – Lead, Structure, Collaborate

Good business discussions don't usually happen by accident. Nor passively can we expect clients to make the running (Complacent Partner: "If he wants to talk about that sort of thing, he will"). It is up to our professionals to initiate and sell the need to the client for a 'review of how things are going with you'. Once done, they should take further initiative by proposing what they want to talk about and get client buy-in to this by sending an agenda for his/her/their input.

Tip 2 – Canvass Inside & Out

So if allowed, do a number of them tip up to the meeting totally unprepared? You bet they do! After all, this isn't fee-paid work is it? It's far less important. Except that if they mess up, the consequences could be, ahem, interesting for future work streams. All it takes is a quick search for the latest on what has been going on in the client's world, and a few calls or emails to relevant colleagues to get their views on current client service and other issues.

Tip 3 – Bring an IDEA

What differentiates one professional firm from another?: in practice, very little. One thing that clients say consistently that they are looking for is advisers who are proactive and give them insight. So from the work done in Tip 2, get your professionals to find an idea to bring to the party that will be of value to the client.

People Scope helps professionals to build better business rapport with their clients. For more information, hit 'Reply' and type **Better Client Discussions**. For more general information about what we do, go to www.peoplescope.com.

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Best regards.

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