Franklin D. Roosevelt, foreshadowed this when he quipped, “An expert is a fellow who's afraid to learn anything new, because then he wouldn't be an expert anymore.” (Location 412)

When you have the expert mindset you tend to talk at your client and focus on your extensive expertise. Your selling approach is to enthusiastically pitch your solutions With the advisor mindset, in contrast, you ask thought-provoking questions and listen deeply. You engage others in a discussion about their most critical issues. (Location 421)

Experts usually accept the client's definition of their challenge. Where possible, however, advisors work with their clients to reframe it in order to define the total problem and the total solution. The result is greater impact and more value. All in all, when you have the expert mindset you tend to focus singularly on the transaction. Advisors takes a broader outlook, putting great value on the long-term relationship. Even when there are no fees coming in, they still add value to their client and behave like a trusted counselor. (Location 426)

So step one is to develop a clear value proposition. Can you succinctly articulate how you help clients? What outcomes do they achieve when they use your services or products? Sometimes we forget that what clients actually buy is a business result that is delivered by the solutions you sell. (Location 509)

My friend Marshall Goldsmith, the executive coach and bestselling author, says, “I help successful people achieve positive, lasting change in behavior; for themselves, their people, and their teams.” (Location 530)

One of my clients decided to use their reward system to encourage adherence to their target client definition. They made a list of 1,000 companies, and their people only got credit for sales to those organizations. That sounds harsh, but it dramatically focused their efforts and improved their profitability. (Location 545)

I also want assurance that the client's reputation will enhance—or at least not diminish—my own! (Location 559)

If you don't have a visible impact, you probably won't have an enthusiastic client who is referring you to others. So screen for this right from the start. (Location 582)

PUTTING KEY IDEAS INTO ACTION Create clarity about the value you offer clients by writing down your value proposition. What benefit or value do clients derive from your solutions and from having a relationship with you? Test out and refine your value proposition with some of your best clients. Does it resonate with them? Does it correspond to their own view of what you offer? Strategic fit: Write down the criteria for your ideal client in terms of size, industry, location, type of operations, and so on. Then, assess how many of your current clients match those criteria. What does this tell you? Relational fit: What are the characteristics of your ideal client from a relational perspective? I listed some earlier that might also be meaningful for you, such as a history of positive relationships and respect for your expertise. Create your own list. Again, what percentage of your current clients would pass your screen? Potential for impact: For you, what are the ideal conditions that allow you to have a positive, lasting impact on your clients? What percentage of your current clients meet these conditions? Could you change or renegotiate elements of those relationships that don't stack up to your criteria (e.g., increase the scope, connect at more senior levels) and increase your impact? Review your prospects and clients. Is there anyone—or any project—you should be saying "no" to? (Location 621)

"When I first started working with clients," he told me, "I had a kind of 'humble servant' attitude. But then I realized most clients actually want a trusted partner who is dedicated to them but also willing to push back and give them the unvarnished truth. So I changed my style, and it transformed my relationships. Now, I approach clients as peers and they use me as a sounding board. I have also found that being caring is essential—you have to show you care about them as people and you want them to succeed. Part of that is just being human—I can say, in response to a client's question, 'I don't know. But I'll get you an answer tomorrow.' That honesty makes you more authentic." He added: "When the client's formulation of the problem is too narrow, I push back. Sometimes, I say, 'To get the result you need, we need to step back and look at a broader scope.' This gives me a lot of credibility—I'm not just taking orders." (Location 730)

Large Clients. An entire career can be built around just a handful of large clients. You must be highly relationship-focused, get to know a client's organization extremely well, and build a network with multiple buyers. (Location 749)

There are many benefits from media recognition of your expertise and success. The cumulative impact of reaching level three produces, to use a term popularized by author Alan Weiss, "marketing gravity." When you have marketing gravity, rather than being forced to cold-call clients to drum up business, clients are drawn toward you by the gravitational pull of your renown. (Location 776)

First, writing and speaking are powerful disciplines that sharpen your thinking and crystalize your insights. Write a short article, blog, or white paper on a topic. Put time into it and produce something of quality. You'll find you are then vastly more incisive and persuasive. You'll crackle with energy and clarity when you talk to a client about that subject. Writing and speaking raise your game. (Location 792)

there are between 15 and 25 people who will have a huge, disproportionate impact on your career success. You need to identify them and intentionally deepen your relationships with them. (Location 838)

PUTTING KEY IDEAS INTO ACTION Develop internal recognition by building a reputation for helping others succeed. Remember Dale Carnegie's famous quote: “You can make more friends in two months by becoming interested in other people than you can in two years trying to get others interested in you.” Start by learning the priorities and goals of the people in your professional life. Rate your client recognition using a scale of 1 to 5, where 1 = Almost no recognition, and 5 = Very high recognition. What would your score be for current clients? For the overall client market you serve? Write down one or two key areas of expertise that you want to be known for. What are three or four steps you can take, in the next six to nine months, to deepen your knowledge of these topics? Put these activities into your calendar. Also write down three or four personal qualities that you want to be part of your own personal brand. Complete this sentence: “If asked, my clients would say my most outstanding qualities are X, Y, and Z….” Make your implicit knowledge explicit. Pick a common problem or challenge your clients face, write it down, and then list four or five strategies to address it. This can be just 400 to 500 words—like a blog entry. One simple, short piece alone can create five or 10 interesting client conversations for you. Write a minimum of one short article or white paper every month. In a year you'll have 12 interesting thought-starters that you can share with clients, publish online, post on LinkedIn, or submit to publications in a longer article format. (Location 846)

There was no “one way” that we used to find new clients. I started by assessing the current but rather limited list of clients. First, we held client account planning sessions to look at opportunities to sell additional services and expand these relationships—those were our best, short-term opportunities for new revenue. Second, I built or strengthened relationships with what I call collaborators, who could introduce us to new clients—in this case, well-known business school professors and other university faculty the firm had a connection to in Italy. Third, I looked at opportunities to meet with the Italian operations of multinational clients that the firm was doing business with in other parts of the world. And fourth, I sat down with my Italian partner, who was well-connected in Italy, and made a list of executives we could go talk to. Between all of these sources, we quickly built a sales funnel of promising leads. (Location 882)

I always, somehow, got warm introductions. (Location 889)

I didn't offer to help his daughter with the expectation of currying his favor or getting a project—I honestly did it to be helpful. I care about other people, and it was a natural response to the CEO's dilemma. For him, it cemented his professional and personal trust in me. (Location 903)

Bain & Company used the flagship strategy to build out its global network of offices rapidly, while maintaining high levels of profitability. In each city, they would aim to grow one major client—they referred to it as a “consolidated relationship.” Then, and only then, would they actually set up an office with local hires. (Location 913)

There was another common theme to all of our client development efforts: added value. I feverishly packaged and repackaged my and my firm's thought leadership on topics of interest to the Italian companies I was calling on. I wrote articles, had them translated into Italian, and then pitched them to local publications and media. I shared best practices from our work with other companies in the same industries. And I always made sure I brought a couple of ideas to each client meeting. (Location 919)

The most important thing I want you to focus on right now is the first box at the top—on increasing the number of conversations you are having with qualified prospects and clients. By qualified I mean one of three types of people: First, someone who is a buyer—a decision-maker who can authorize purchasing what you sell. Second, someone who can lead you to a buyer. And third, someone who can help prepare you for your meeting with the buyer. (Location 943)

When you are trying to grow your business, where do you start? The old paradigm was to look where there was light—where the obvious names were. The problem is that you'll join a long queue of competitors at the door of these companies. (Location 957)

Platinum: Inspire inbound leads Existing client calls you. You enable this through consistent, high-quality delivery. You also need to engage your client in regular agenda-setting discussions where you explore their emerging plans and priorities. Additionally, ensure your clients have an up-to-date understanding of your capabilities and solutions. Prospective client calls you. This happens when you have built recognition in the marketplace for your expertise and thought leadership, encouraged your clients and other collaborators to share positive wordof-mouth about you, and built a reputation for working with leading companies and institutions. (Location 966)

Start with a non-commercial relationship. Some of my best relationships with senior executives have started this way. You might connect with an executive through a non-profit organization, by involving them in a research project, by interviewing them for an article or book, and so on. This is another reason to do research, write, and publish: It gives you an excuse to engage with senior executives and other thought leaders. (Location 999)

one of my clients won a $10 million contract with a CEO who had never worked with them before. The first contact was through LinkedIn, when a managing director leveraged a mutual connection to get the CEO's attention. They invited the CEO to a high-profile firm event, which he attended. It turned out my client had an alliance with a well-known tech firm that the CEO already did business with, and that connection created more credibility. Face-to-face business discussions followed, leading to the deal. (Location 1039)

The more potential clients you get in front of, the more you'll be in the mix. It's a virtuous circle. The late, brilliant Jerry Panas was my coauthor for two of my books. He used to encourage the non-profits he advised to have more conversations with potential donors. Of course, many would say no. But some would end up making life-changing donations. Jerry used to say, “Some will. Some won't. So what?” (Location 1046)

VIP Contacts These are your best relationships with influential individuals. As I mentioned earlier, they should be: Decision-makers at companies in your target market Individuals who can introduce you to or influence the decision-makers who buy your solutions People who, because of their experiences and connections, can advise you on how to penetrate a new client (Location 1067)

Some first meetings just don't go well. But let's distinguish between an unforced error and a forced error. (Location 1104)

We spent the first five minutes in small talk. I intentionally focused on some things we had in common in our background, and someone we both knew. I briefly described my practice. To do that, I didn't use any written material or slides. Rather, I shared an illustrative story about my work with an admired competitor, and some of the key lessons that emerged from it. Then, I asked him three or four thoughtful questions about his most pressing issues. One of his challenges was right up my alley, and I provided examples of best practices I have seen for managing it. Later, I drew a graphic on the whiteboard in the room to help frame up the different options I felt he could consider. At the end of our hour, he enthusiastically suggested we schedule a follow-up conversation. Two weeks later, I had a signed contract. (Location 1113)

Answer these questions Answer these questions as you prepare for your meeting: What challenges is this client's company/organization facing? What are the priorities, needs, and goals of the executive you're seeing? How can you help this client address these issues? What client examples will resonate with them? What is the other person like? What's her communications style? What do you have in common with him? What engaging, value-added ideas can you share? What are three, thought-provoking questions you'd like to ask? (Location 1158)

General approach: “I understand we've got one hour scheduled for this discussion—is that right? (pause) I wanted to share with you my approach to building clients for life and describe a couple of examples of how I've helped other firms improve both their new client acquisition and their ability to grow and retain existing relationships. Then, I'd love to hear about your efforts to grow your client base and what your most important priorities are right now. At the end of our conversation, I'm sure we'll both have a good sense for whether or not it makes sense to continue the dialogue. Is there anything else that you'd like to make sure we cover?” (Location 1237)

“I understand we've got about 45 minutes today. From your perspective, what would be the most valuable way for us to use this time?” (Location 1243)

Topic-specific approach (e.g., the client has previously been very specific about what they want to focus on): “I understand from our email exchange that you'd like to increase the ability of your people to act as strategic advisors to their clients. Let me start by asking you to say more about that issue—for example, for you, what does it mean to be a strategic advisor, and what's the gap you've identified? Later, if it would be useful, I can share some examples of projects I've done for other clients to help them significantly improve the trusted advisor skills of their client service partners.” (Location 1246)

The point is that unless you are already well known to the client you are meeting with, you have to build your credibility. You can't just plop down and start peppering the client with questions. But here's the catch: You must learn how to build your credibility in about three or four minutes. Otherwise, you will make the conversation too much about you and not enough about your prospective client. You also need do it indirectly. When you try to say “I'm smart and experienced,” it's not believable. Of course you'd say you are! (Location 1262)

Better idea: if you have frameworks or diagrams you want to show, draw them on a flip chart or whiteboard. It's called “pencil selling” and it's far more engaging than projecting a slide. (Location 1268)

One: Share value-added points of view (POV) (Location 1275)

For example, I might say, “It sounds like gaining more collaboration to serve your clients across organizational silos is an issue for you. In looking at my other clients, the three most common barriers to collaboration I see are … (then I list them). But I'm curious, in your own organization what particular obstacles are getting in the way?” (Location 1285)

Client examples—like a point of view—should very brief. These are not long case studies. They are conversational. Don't tell your prospect all the details. Instead, focus on three things: the original problem the client wanted to solve; the approach you took (which ideally illustrates the uniqueness of your solution); and the results or impact. Write down your examples, hone and polish them. Practice speaking them out loud. Record them and listen to how they sound. Memorize them—if you don't, instead of giving a crisp, one-minute example you will spend five minutes wandering through your case study, which will surely stultify the client. (Location 1301)