



Clients for Life:

Evolving from an Expert for Hire to an Extraordinary Advisor

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Authors' big thought: Supported by more than one hundred case studies and wisdom gleaned from interviews with dozens of leading CEOs and prominent business advisors, this book identifies what clients really want and lays out the core qualities that distinguish the client advisor, an irreplaceable resource, from the expert for hire, a tradable commodity.

Chapter Notes:

Introduction

- The development journey, from expert for hire to trusted advisor, is the focus of Clients for Life. From extensive research the authors have developed a client-validated model for success – a roadmap of the specific characteristics that underlie extraordinary performance with clients – that will help establish and sustain more of those enduring, advisory relationships.
- The authors set out to comprehensively research and answer a series of fundamental question: Why do some professionals manage to develop long-term relationships and become trusted business advisers to their clients while others get called in on a one-off basis like commodities? What qualities do leaders look for in the professionals they bring into their inner circle? How do clients define value?
- The result of their research is that they have identified the *essence* of what it takes to become an extraordinary professional and consistently provide value to clients.
- This book is intended for professionals who serve clients. They define a professional as someone who practices an occupation requiring a high degree of education and training and who has clients rather than customers. This definition includes not just service professionals, but also technology consultants and sales executives who sell a complex product.

- The distinction between a client and a customer is more than semantic. The professional's relationship with a client has a consultative aspect to it – there is give-and-take to clarify needs, identify problems, and recommend solutions.
- Professionals who are staff or functional managers within corporations can also profit from the concepts in this book. Human resources or finance specialists who report to line executives, for example, face the same challenges that outside professionals do in creating value, and they are held back by similar barriers.
- Throughout the book, the authors have used historical advisers as well as highly accomplished contemporary professionals to illustrate the journey from *expert for hire* to *trusted adviser*.

What Clients Want – from knowledge worker to wisdom worker

- Behind every great leader – in fact, behind most successful individuals – you'll probably find at least one great adviser. Today a group of over five million service professionals, in a variety of fields, have largely replaced the clergymen and philosophers who once advised society's leaders. Collectively, these professionals comprise what is in fact the largest industry in the world with over \$500 billion in annual revenue.
- Three barriers stand in the way of becoming a business adviser to your clients, and of experiencing the client loyalty and professional fulfillment that accompany this role.
 1. Most professional service firms demand specialization. Sometimes these short term pressures override the long-term process necessary to build deep, trusted client relationships.
 2. Expertise is being automated and reduced to a commodity. Several forces combine to diminish the value of expertise:
 - The supply of service professionals is growing significantly
 - Price-based competition has become a permanent feature of the market for professional services
 - The internet and expert software now provide unparalleled access to all kinds of expertise, at far lower prices than ever before.
 - Labor mobility among knowledge workers is increasing.
 3. Many professionals are held back by stereotypes about what clients want them to be and how they should behave (e.g. "My job is to provide answers"). Many professionals focus on providing answers, being perceived as "experts", doing great analysis, and specializing more and more during their careers. Clients in contrast, seek professionals who can ask the right questions, provide knowledge breadth as well as depth, demonstrate big-picture thinking as well as analysis, and listen rather than just tell.
- The authors' research suggested that experts and advisers are different in many important ways. Professionals, who are client advisers, behave very differently than experts, and consequently they develop client relationships that are broader, deeper, and richer. Part of the difference lies in their skill and knowledge base: they are wide-ranging exploratory learners and big-picture thinkers. Part is due to attitude: they collaborate rather than control.
- Although we often feel our careers should proceed from one success to the next, the development of these qualities is actually facilitated by struggles and setbacks. Learning from your struggles and taking active control of your own development will put you on the

path to becoming an integrated, fulfilled professional who offers far more than just expertise to clients. You can evolve from a knowledge worker, an expert for hire, to a *wisdom worker*, a trusted adviser.

INSIGHT X COLLABORATIVE RELATIONSHIP = CLIENT VALUE

- How do trusted advisers create value? Value is a complex concept that can mean different things to different clients, depending on their needs at a given point in time. Generally, however, value is created by solving problems, helping your clients achieve business and personal objectives, getting critical work done, and enabling your clients to feel good about themselves as people and professionals as you complete your assignment.
- Clients define insight broadly; it doesn't have to be a radical new idea or inspiration. Professionals who are insightful, clients tell us, do some or all of the following things:
 - They add significant new perspectives to the problem or issue at hand.
 - They help to focus the discussion on the most critical, relevant issues.
 - They provide specific ideas and solutions.
 - Sometimes, clients feel their advisers are insightful when, through artful questioning, listening, and discussion, they enable clients to arrive at their own solutions.
- Fundamentally, a relationship enables you to learn about your client. Through the relationship, you end up knowing more about your client-about his needs, preferences, and habits-than anyone else, and your ability to provide insights rather than just information or generic recommendations increases significantly. This creates a powerful entry barrier for competing professionals who may want your client's business.
- There are seven key attributes that, when blended together in the right quantities and in the right manner, facilitate the development of insight and the formation of deep, trusting relationships. These characteristics are a blend of innate talent, acquired skill, and attitude, and it's pointless to try to determine exactly which is which.
- There is a natural, logical progression w the development of these attributes and to the order in which they usually come into play in building an advisory relationship. The two foundational attributes for any professional who aspires to serve clients are *selfless independence* and *empathy*. Great advisers have an attitude of complete financial, intellectual, and emotional independence. They balance this independence, however, with selflessness-they are dedicated, loyal, and focus on their client's agenda, not their own. It is a fine line to draw: on the one hand, being responsive to a client's needs and problems and, on the other, maintaining objectivity and honesty at all times. This selfless independence illustrates why clients are different from customers.
- The second attribute, empathy, is what opens the door to learning. Empathy fuels your ability to discern a client's emotions and thoughts, and to appreciate the context within which that client operates. It enables you to diagnose what the problem really is and later underpins a learning relationship with your client.
- The next three attributes concern your ability to think and reason. You simply have to have something valuable to say before you can develop the long-term professional relationship. A passion for learning drives the professional to develop a core expertise and then to become a *deep generalist* by continually broadening her knowledge. *Synthesis* is the ability to see the big picture, to draw out the themes and patterns inherent in masses of data and information. It

includes related skills; such as critical thinking and problem solving. The ability to synthesize sets the business adviser apart from the subject matter expert who relies mainly on analysis. *Judgment* is often-but not always-the culmination of a particular engagement or advice session, drawing on all the learning and synthesis you have undertaken.

- *Conviction* and *integrity* constitute two important character attributes that are common to all of the extraordinary professionals studied. Conviction comes into play as the adviser begins to offer opinions, recommendations; and judgments in earnest. Conviction, however, does not exist in a vacuum; it is based on a set of compelling, explicit personal beliefs and values. Properly harnessed, it is a powerful force that can motivate and energize both professional and client.
- The attribute of integrity comprises a constellation of skills and behaviors that build trust, including discretion, consistency, reliability, and the ability to discern right from wrong. Without this trust, -it is unlikely you will develop a collaborative relationship.
- There are other qualities, of course-motivation, optimism, tenacity, determination, analytical skills, and so on- that are valuable for professionals and indeed necessary to be a successful expert. The seven identified, however, are the ones that truly stand out and make a difference in a professional's effectiveness. They enable you to go beyond expertise and become a broad-based adviser. These are the qualities that foster the development of the insights and relationships that lead to consistent *value creation* for clients, and they are the characteristics that great advisers themselves have intuitively developed.
- These attributes build on and interact with each other to create a whole that is greater than the sum of the parts.

Selfless Independence: Balancing Detachment and Dedication

- Great professionals maintain a delicate balance between dedication to their clients and detachment from them, exercising selfless independence. Without it, you lack substance as a client adviser – you're just another expert for hire. With it, you are able to inspire both respect and loyalty from your clients.
- The number one complaint from executives is that many of the professionals they employ focus too much on their own objectives and needs.
- The great client advisers do everything in their power to make their clients successful, but they also speak their minds and won't compromise their integrity and beliefs. They know where to draw the line.
- Most clients respect the professionals who stick to their guns and say what they really believe. If you develop a reputation for independence of thought and intellectual honesty it will put you into a relatively small pantheon of professionals who, in the eyes of clients, are irreplaceable. An important issue for professionals is how to reconcile the need for honesty and directness with a client's natural defensiveness. Convincing clients can be a long process, and if you turn them off too quickly you lose your chance to influence them.
- Anger and defensiveness are typical reactions to news we don't want to hear. After reflecting on what you have to say, your client may eventually come to accept your perspective. In any event it is your responsibility to be objective and straightforward; if the client reacts poorly,

you'll still have done your job. Ultimately you'll probably choose not to work with clients who aren't really interested in points of view that contradict their own.

- There are three distinct types of independence that great professionals exercise:
 1. Intellectual independence – great advisers always find an appropriate way to say what they think.
 2. Emotional independence – staying calm and centered while the client or the organization is “hitting the walls” can be difficult. Furthermore, since your livelihood or promotion prospects often hinge on the outcome of your work, you may start to hang on every nuance of mood or emotion that your client expresses. You have to be involved yet detached at the same time.
 3. Financial independence – the best advisers are highly paid, but act as though they are not being paid and don't really need the money.
- Independence has to be tempered with an attitude of selflessness. This is a mindset in which the adviser, while preserving integrity, concentrates on serving the client and meeting her needs. This mindset has to be active throughout all day-to-day activities, manifesting it in effective, empathetic listening during meetings, responding rapidly to client requests, and developing proposals that truly reflect the client's agenda rather than the adviser's sales quota for that quarter.
- Selflessness has many dimensions to it:
 - A focus on your client's agenda rather than your own
 - An understanding that you are there to serve and to support your client's needs
 - A willingness to share or even relinquish control in the relationship
 - A conviction that your responsibility as an adviser is to supply the right questions; your client has most of the right answers
 - Respect for clients
 - Self-effacement – the less public credit you try to take, the more private credit your client will give you
 - The ability to see your client's needs, undistorted, just as they are
- One of the most important things a professional can do to cultivate *selfless independence* is to develop and articulate her own beliefs and values. These fuel your conviction, which is necessary for the *independence* part of the equation.
 - Be clear about your ethical principals
 - Develop a mindset of independent wealth – this means that you do the right thing without regard to the monetary outcome. Cultivate an abundance mentality.
 - Take a hard look at your client list. Saying *no* is a powerful way to focus your practice and ensure you're spending time with motivated clients who appreciate you. Professionals need to say no to client engagements that aren't fun, aren't learning experiences, and don't allow you to truly add value and do great job.
 - Constantly reflect on your client's needs and how to fulfill them
 - Be prepared to help your clients with any of his needs. Constantly tune into ways you can help and serve.

Hidden Cues- Becoming Empathetic

- Commonly defined as the ability to perceive other people's emotions and thoughts, empathy enables us to:
 - Understand the character, perspectives, motivations and values of the people we work with
 - Form deep, meaningful, personal and professional relationships
 - Respond to others in appropriate and effective ways.
- Empathy enables you to learn about your clients, making you more innovative and effective as a professional. It also helps you create a rapport with your clients, allowing you to constantly exchange expectations about the work that you're doing.
- Empathy enables you to tune into your client's mood, frame of mind, and concerns. Understanding emotions is the first aspect of empathy: individuals who are good at this know when to press their point and when to change the subject.
- Empathy is also the ability to understand thoughts, to hear rather than just listen.
- Professionals who excel at developing broad-gauge relationships are skilled in yet a third type of empathy, contextual empathy, or the ability to understand and appreciate the context in which a client operates. What are the forces and pressures acting on the client at the moment? How are her relationships with peers? With the boss? What's happening in the marketplace – or on a personal level – that may be affecting her moods, thought processes, and sensitivities? Taking this a step further, you need to examine the emotional, rational, and political contexts of your client's thinking and decision-making processes.
- There are three fundamental preconditions for the exercise of empathy:
 - *The right attitude* – you have to be interested in order to be empathetic. The second element of the right attitude is genuine interest in learning. Humility is the final part of having the right attitude. Many great client advisers have grown and become open and empathetic through humbling experiences that they went through.
 - *Self-awareness and emotional self-control* – It is widely accepted that self-awareness and the ability to regulate your own emotions are fundamental prerequisites to the practice of empathy. Emotional self-control can follow once you achieve self-awareness.
 - *The practice of specific empathetic listening skills*- Great client advisers are superb listeners. Their ability not only helps them gain information critical to their work, but gives their clients breathing space and allows them to think through issues on their own. Empathy also underpins their personal and professional relationship with the client and helps it grow over time. Here is an interesting fact – people speak 200 to 250 words per minute, whereas we can digest something like 300 – 500 words per minute. This is why listening can make us feel impatient.
- Here are some suggestions to improve your empathy skills:
 - Put yourself into unfamiliar situations where you have neither mastery nor control – where you have to listen and observe more than usual.
 - Travel – when you have left the cocooned existence you call your home, you are suddenly exposed to a raft of new sights, smells, tastes, points of view, and sufferings.
 - Accept occasional failures or setbacks and learn from them.

- Gain an understanding of your own basic strengths, weaknesses, and personality type. The Myers-Briggs can be extremely helpful to professionals as it helps you understand key aspects of your behavior and thinking processes.
- Learn to distinguish between observations and judgments
- Always listen at the most involved level. The highest level is engaging in empathetic listening, during which you listen deeply, actively observe, interpret nonverbal cues, and sense the underlying messages behind the words. Practicing affirmation – affirming and paraphrasing what your client has said to you – can help sharpen your focus on listening.
- Recognize and eliminate your personal filters
- Think hard about what your client is going to say
- Ask guiding questions that help clients find their own answers. These questions help clients clarify the issues for themselves and develop their own solutions. Guiding questions move the discussion beyond the basic facts and get clients to reflect on key issues and desired outcomes.
- Seek honest feedback from clients about your performance and the conduct of the relationship
- Professionals who excel with clients develop an understanding of personality types and adapt their communication styles appropriately. They know that some people are fact-based and task-oriented and want to get right to the point; others are reticent to express their views and have to be carefully drawn out; still others value the social nature of your meetings and want to dwell on personal and not just business topics..
- Great professionals vastly expand their universe of relationships by being students of character and by consciously and methodically adapting their communications to each individual client.

Deep Generalists: Building Knowledge Depth and Breadth

- According to leadership authority Warren Bennis, “the professionals who develop into really great advisers are *deep generalists*. They develop a unique blend of knowledge depth and breadth”. Professionals who become deep generalists are able to add value in a greater variety of ways, more often and more consistently, than the average practitioner.
- A deep generalist is someone who has a core expertise onto which he layers knowledge of related (and sometimes unrelated) fields. The result is a *business adviser* with technical depth rather than a *technical specialist*.
- Extraordinary professionals love to learn and become skilled at learning. Becoming a deep generalist doesn’t happen overnight. It’s a slow evolutionary process. It involves acquiring deep expertise and then adding – sometimes simultaneously, at other times sequentially- complementary knowledge.
- Developing your core expertise comes first. Deep expertise alone doesn’t create the kind of lasting client relationships that this book is about, but it will engender respect and credibility and become the starting point for relationships.
- A prerequisite to becoming a deep generalist is to cultivate a learning attitude. This attitude, and its consequences, can be summed up by an ancient but still fresh Zen proverb: *When the student is ready the teacher will appear.*

- Having a student mindset is not enough. You have to be ready to learn, often by unlearning old precepts or concepts that are no longer valid. Students who are ready rapidly identify and incorporate new information and ideas. Ready students are constantly on the lookout for people and experiences they can learn from, and they know these teachers can appear at any time.
- The knowledge acquisition strategies of client advisers are fundamentally different from those pursued by experts, both in terms of what they learn and how they learn it. There are three learning arenas:
 1. *Core expertise* – most professionals spend the vast majority of their learning time just trying to keep up with new developments in their fields. These professionals seek to drill deeper onto the core of knowledge that defines their expertise.
 2. *Ecosystem* – Every professional applies his expertise to some larger *ecosystem*. Often this ecosystem is the world of business and management, although many professionals also work in ecosystems such as healthcare or government. In this wider zone of learning, many experts drop out.
 - In addition there is a personal ecosystem that you must be aware of. It comprises information about your client's aspirations, goals, and values as well as professional status and familial situation. This kind of mastery is precisely what enables you to develop tailored, innovative solutions and truly stand out in your client's eyes.
 3. *Personal interest* – You never know how your personal interest learning may one day connect with professional opportunities and your effectiveness with clients.
- In the last two categories- ecosystem and personal interest- great client advisers engage in *exploratory* learning. Some people retain their youthful curiosity and inquisitiveness and remain explorers as adults. Play is often the mechanism that allows us to explore as adults.
- If you want to develop into a deep generalist, a final aspect of learning to consider is *how to learn*, which is a function of both attitude and the specific learning strategies you adopt. The most effective learners cultivate an attitude of mindfulness – which means cultivating a flexible, open intellect.
- You can accelerate your learning by using the following knowledge acquisition methods: direct expertise, study, observation or modeling.
- The first key difference in the learning habits of ordinary versus extraordinary professionals is that the latter spend more total time dedicated to active learning and knowledge acquisition.
- The second difference between the learning habits of experts and of advisers is in terms of where they spend their time. Experts spend the majority of their time becoming more expert in their chosen subject. Advisers also continue to cultivate their expertise, but they work to give it increasingly greater context.
- Client advisers thus spend perhaps as much as one-half of their learning time in the exploratory learning zones, ecosystem and personal interest, whereas typical experts might spend only a small fraction of their time there. Experts do the vast majority of their learning experientially, whereas advisers supplement their experience-based learning with reading and study; they develop acute observation skills that enhance their ability to learn under a variety of circumstances; and they use successful individuals around them as role models.
- The highest value seems to be created by individuals who take a multidisciplinary approach, despite the fact that we are all endlessly pushed to specialize.

- Developing in-depth knowledge about your client is the best and quickest way to get in a position where you can contribute insights and create the foundation for a long-term, collaborative relationship. Client learning occurs on three levels, and at each succeeding level you become more and more valuable to the individual you serve. From the broadest to the narrowest, the three levels are:
 1. *Your client's industry,*
 2. *Your client's company and organization:* As you build knowledge about your client's strategy and operations, your ability to suggest new ideas and solutions increases dramatically.
 3. *Your client:* It's important to know your client both personally and professionally. You develop an understanding of her strengths, weaknesses, and preferences. You learn when to push hard and when to step back. At this level of client learning you are in a unique position to add extraordinary value.
- When you have mastered all three of these levels, your ability to anticipate client needs, bring fresh solutions and ideas, serve as a sounding board, and provide comfort and reassurance to your client at its peak.
- Your goal has to be more than just developing general knowledge about your client. You need to learn things about his organization and his company that even he doesn't know; you need to be in a position to actually teach him aspects of his business.
- There is no formula for developing the breadth of knowledge that is characteristic of great professionals. The authors however, have observed certain habits and practices among the advisers they studied.
 - *Learning through teaching:* The best learners like to teach, and teaching helps them learn. When you teach something, you have to organize and systematize what you know. This process solidifies your thinking, pinpoints the gaps, and forces you to go deeper into the subject matter.
 - *Exploring:* A consultant has to understand how an area of focus – be it information technology, logistics, or personnel – fits into the client's broader business strategy. When educating yourself about history and culture it needs to become a longer-term habit; collecting a few unrelated facts or random trivia won't help much.
 - *The role of play:* Contemporary research on play has produced evidence that adults who engage in play have superior cognitive abilities. There appears to be a correlation whether or not one leads to the other.
 - *Powers of observation:* Extraordinary professionals have well-developed powers of observation. No matter where they are – at work, with their families, or at play – they are always listening and watching. It's not enough to listen carefully and watch closely; you have to keep wondering why and trying to develop explanations for what you see.
 - *Knowledge acquisition as a daily routine:* Learning has to be like exercise or diet: it should be embedded in your lifestyle. Reading new things immediately is a good strategy that many effective learners employ. If you pile up articles, books and papers, with the intention of reading them at some future date, you'll rarely get around to them.
 - *Enlarging your professional focus and experience:* Many of the effective professionals studied continued to develop their original expertise – their distinctive competency – but they also layer new knowledge on top of it.

The Big Picture: Cultivating Power of Synthesis

- Because of its insights into leadership and the use of power, *The Prince*, by Machiavelli, is an important work for modern professional who advise clients. If you aspire to be a big-picture thinker, the book is particularly instructive because it is an example of a prodigious synthesis, a brilliant distillation of the underlying patterns that characterize successful rulers and their policies.
- “Synthesis” comes from a Greek word meaning “to put together into a whole”. The essence of synthesis is being able to identify overarching patterns and themes, to see, in effect, the big picture. The ability to synthesize, which is really at the root of strategic thinking, is one of the reasons an adviser is more valuable than an expert.
- Synthesis and analysis are complimentary opposites because we need both of them. Without a good understanding of the individual elements of an issue or problem, you’ll never produce a good synthesis, and if you don’t go beyond just analysis of the problem, you’ll be of limited help to your client. They are also opposites because analysis and synthesis involve fundamentally different processes. Analysis is concerned with breaking things down into elements and examining each piece according to a set of prescribed, logical steps; synthesis, in contrast, entails building up an idea, concept, or framework out of the details, often in an illogical, nonstandard, or roundabout way.
- Good synthesis – a thinking process that identifies patterns, simplifies and frames the most critical issues, creates a new idea or develops new conclusions from old data – is a scarcer and more valuable activity. It helps clients prioritize their issues and understand what it is they actually need to do, rather than just giving them a snapshot of what is.
- There are three major ingredients necessary to develop. First, the *foundations* have to be in place. These consist of an overarching purpose or goal that conditions your thinking and motivation; a clear view of the whole picture; and an understanding of the most critical, relevant issues within that whole picture. Second, you need to utilize specific *tools and techniques* for synthesis, such as simplifying frames, multiple perspectives, and pattern identification. Finally, there are some *habits of mind and practices* – for example, taking time for reflection and staying involved in hands-on client work – that will help you effectively use these tools and arrive at the big picture.
- The first stone in the foundation of a good synthesis has to be a sense of *purpose*. You have to have the end you desire clearly in mind, when you begin the process of synthesis.
- Next you have to develop an understanding of the whole picture. Tools for doing this include building knowledge at three levels – industry, company, and individual client (or culture, family, and client) – and developing a deep, contextual understanding of your client’s entire ecosystem.
- For managers, *critical issue selection* – the ability to identify and focus on the most appropriate and relevant priorities and problems – is a fundamental skill.
- For professionals who want to evolve from specialists into broad-based business advisers, this ability to prioritize is even more important: clients expect you as an outside adviser to keep them focused on the most important problems and priorities. How do you do this? First by

constantly screening these issues against the ultimate purpose at hand. You have to ask, “Which issues will really affect the outcome I seek?” second, you need to distinguish between symptoms and causes.

- The ability to frame and communicate the critical issues gives an edge to any professional. When it comes to communicating your ideas and conclusions, you have to consider that most people are able to absorb and remember *three main points* during any major presentations or discussion.
- Once the foundations are in place, there are five specific techniques that you can use to undertake synthesis and develop the big picture for your client.
 - *Develop simplifying frames.* Framing is the essence of synthesis. It organizes and explains complex phenomena by reducing them to a few, simple dimensions. A good frame highlights the most relevant aspects of the issue or problem, shows how they interrelate, and then connects to your overarching purpose or goal. Often, frames provide a picture or visual representation that makes it easy to rapidly understand the key relationships. The essence of framing is a reduction to basic components and drivers. Two well-known frameworks that have become influential are:
 - The growth-share matrix of the Boston Consulting Group categorizes businesses in a company’s portfolio as to market share and growth as stars, question marks, cash cows and dogs.
 - Stephen Covey’s time management model (The 7 Habits of Highly Effective People) classifies all of your activities along two dimensions: degree of importance and degree of urgency.
 - *Use analogies and metaphors.* Storytelling is a powerful communications form that is heavily based on the use of analogy and metaphor. They are effortlessly digestible and easy to remember.
 - *Develop multiple perspectives:* part of the essence of synthesis is looking at the world with the broadest possible view. Professionals require a number of perspectives that help them develop the big picture. First, every constituency involved in the problem you are trying to solve has a particular point of view, and you need to understand it. There is a second type of perspective that great client advisers acquire, which we call a multidisciplinary perspective. The challenge is to understand and appreciate the perspectives of other corporate functions, such as marketing or manufacturing, and other disciplines like economics or organizational behavior.
 - *Reverse your thinking:* reverse thinking is a form of synthesis that involves completely rearranging the pieces to create a new whole. As in the case with other tools for synthesis, there is no cookie-cutter approach to developing reverse thinking. You can start the process, however, by asking a series of questions that challenge the status quo: Why does this have to be done this way? What if we turned this process on its head?
 - *Look for patterns and commonalities:* One of the best ways to develop your pattern thinking is to organize and codify. Part of recognizing patterns is the ability to see *commonalities*.
- There are some additional “habits” that can help the tools and techniques used to cultivate your powers of synthesis work and facilitate your ability to see the big picture.

- *Suspension of initial judgment*: Synthesis requires a suspension of judgment in order to allow “unrealistic” alternatives or ideas to be allowed into the discussion.
- *The use of humor*: Clever jokes and stories often present unexpected solutions and juxtapose ideas or concepts that normally would not go together.
- *Time for reflection*: Some researchers in the field of creativity believe that insight occurs during the reflection and relaxation that follows a period of intense activity and work. For many modern-day client advisers, solitude unfortunately comes only during long airplane rides, and then the time is often spent working on a laptop computer or making calls from the plane’s phone system.
- *The power of concentration and observation*: You can develop concentration by clearing your mind of other distractions. Part of the secret as well lies in developing an obsessive dissatisfaction with your answers.
- *Holistic, integrated thinking*: Current theory suggests that the right and left hemispheres of the brain undertake distinct functions. Modern scanning techniques are offering some confirmation of this division of labor; the left side of the brain processes logical, analytical thinking, and the right side handles our more intuitive, conceptual thinking. Many of our great thinkers and creators have cultivated both sides of their brain. While no one knows for sure whether specific exercises can enhance one side of your brain versus the other, you should certainly give yourself freedom to pursue a broad range of personal learning that traverses both science and the humanities.
- *Dirty hands*: Intense concentration of thought and the development of theoretical frameworks are key ingredients in effective big-picture thinking, but it is also true that *doing* is just as important.

An Eye for Winners: Developing Great Judgment

- In hindsight, bad judgment always seems particularly egregious, and good judgment appears especially brilliant; but in fact the quality of judgment is extraordinarily difficult to evaluate. This is because we tend to assess decisions based on the consequences they produce rather than the soundness of the judgment process used to reach them. A sound judgment is logically airtight but it can be punctured by unknowable future events, and the decision makers viewed, in hindsight, as having exercised flawed judgment.
- Conversely, poor judgment can be compensated for by ideal circumstances – bad managers can look good on a fast-growing market, for example, even though they’ve made poor decisions. You have to evaluate each situation carefully before jumping to conclusions.
- Robert Frost’s famous poem “The Road Not Taken” beautifully illustrates the dilemma of choices. Frost tells us, we like to think we are contrarians, but in fact at the time of judgment it’s impossible to tell where each choice will lead us, and we can never go back.
- The key to judgment lies in balance – in carefully blending facts, experience, and personal values to arrive at a decision. A keen judgment is one of the most valuable assets a professional can have.
- It’s important to understand how to avoid bad judgments. First, bad judgments can be deadly for an organization; second, they will ruin your reputation as a professional – your clients will never forget the poor decisions you recommend; and third, it’s very common to make mistakes of judgment, since so many factors can cloud our decision making. Avoiding bad decisions is

one half the battle; even if you don't make particularly good ones, you can muddle along and survive whereas a poor judgment can put you out of business, for good. The exceptional professional, therefore, constantly examines his client's thinking and behavior to help prevent these wrong turns.

- Here are five of the most important judgment traps that professionals should be aware of as they advise their clients:
 1. Weak premises: Starting out on the wrong foot.
 - Many clients approach a problem or decision with wrong or partial facts at the outset, resulting in a chain reaction of faulty thinking. The two most common errors that bias clients are *anchoring* – the decision maker allows himself to get “anchored” on a specific starting number – and *availability*, the tendency to use the most available, recent or vivid information. Clients can get anchored in many ways – for example, in their old growth paradigms.
 - Whatever happens to be the most available, recent, and vivid data can also bias us. This perception bias can operate when managers go out and talk to just a few customers and then draw sweeping conclusions about their company's products and positioning.
 2. Confirmation: Seeing what you want to see
 - Many people start out wanting to confirm – consciously or unconsciously – what they already believe and tend to ignore subsequent evidence that contradicts their beliefs. The confirmation trap is often triggered during mergers and acquisitions.
 3. Overconfidence: Underestimating what it takes to succeed.
 - This is probably the most common and fatal judgment trap. “Business success can breed overconfidence (Robert Sobel).” Several other classic judgment traps that are related to overconfidence include an over-reliance on *rules of thumb* and a misunderstanding of *base-rates*. We tend to simplify our experiences and reduce them to easy-to-remember rules and guidelines. Problems arise when these cherished rules just don't apply. Misunderstanding or ignoring the underlying statistics regarding an event is also common.
 4. Prior commitments: Making new, inappropriate commitments based on previous ones.
 - Prior investments or decisions can unduly influence the formulation of new commitments once we take a stand or position; we often resist changing our mind. In his classic book *Influence: The Psychology of Persuasion*, Robert Cialdini cites many examples of how even very small prior commitments can induce level-headed individuals to agree to things that make no sense.
 5. Groupthink: Believing it's “Us against them”.
 - Corporate organizations often suffer from groupthink, and it can lead their managers to make poor judgments.
- You need to be constantly vigilant for signs that your client is about to fall into one of these judgment traps. Here are some specific actions you can take as an outside professional to help your client avoid lapses in judgment:
 - Always vigorously challenge your clients' assumptions. Introduce as much contradictory information as you can and ask lots of “disconfirming” questions whose answers might undermine the initial premise.
 - Keep yourself up-to-date on key statistics and research in your field.

- Be careful how you ask and frame questions. Many professionals ask questions that are biased and reflect what *they* think or what they feel their clients already believe.
 - Try to identify independent thinkers who can help challenge your clients' thinking.
 - Finally, don't ever let yourself be used to simply confirm something a client already believes. Your collusion may help undo your client.
- What is sound judgment and how does a professional develop it? The elements that contribute to sound judgment can be expressed in a formula with three basic parts:
- Judgment = (Facts) X Experience X (Personal Values)
 - The facts about the issue at hand – too few and you'll be hip shooting, too many and you'll risk overanalyzing the situation, represent the first major input. Experience, which fuels intuition, is the mechanism by which the adviser adds to and processes these facts. Good decision makers then filter the resulting options through a strong set of personal beliefs and values.
 - Historically good judgment was associated with age and experience. Most researchers in the field embrace the cognitive model and believe that solid judgments can only be reached through a highly logical, step-by-step, rational process, focusing, almost exclusively, on the factual inputs described in our judgment formula. Another smaller group of scholars believes that judgment is essentially intuitive, and that most real-world decisions are made with little analysis. Based on the authors' research into professionals and the clients who employ them, they believe that the best decision makers blend these two approaches – cognitive and intuitive – and they add a third dimension, which is the personal value system.
- Great professionals excel at a number of specific practices that underpin sound judgment. They:
1. Frame the problem
 - The first critical step is to identify the right problem and frame it correctly. Diagnosing the wrong problem is one of the most common mistakes that professionals make, regardless of their field.
 2. Engage in creative but selective fact gathering
 - After a minimum threshold of key facts is reached, having more information does not increase the quality of decision making. In certain business situations where time is of the essence, gathering more information can actually decrease the quality of decisions because key actions are delayed as managers conduct more and more analysis.
 3. Use intuition to leverage facts and personal experience.
 - Intuition is a powerful tool for making judgments. The first key component of intuition is the subconscious analysis of patterns. We often experience it as "gut feel", but a better description would be "experience feel." After we have seen, many, many similar cases, we develop an ability to sense whether a new example fits- or diverges from – the patterns we have come to recognize. Developing your powers of observation will help sharpen your judgment skills. In order to leverage your experience, you have to cultivate the ability to observe intensely what is going on around you.

- The second step in using intuition involves imagining how the decision will play out. Very skilled professionals can rapidly simulate scenarios in their minds.
- The intuitive part of judgment also involves the ability to identify analogous situations. These analogies help make better judgments and enhance our understanding of the immediate decision we have to make.
- 4. Incorporate your personal values and standards.
 - Judgment that is consistent with your own character is also based on having a strong, explicit set of personal beliefs, and values that guide your decisions.
- 5. Don't be misled by your experience
 - Although it would be very natural for us to learn from our experience, memories are "reconstructed" after the fact and sometimes not very accurately. We tend to see what we want to see. There are three major pitfalls that prevent us from learning from experience:
 - We claim credit for all successes
 - We minimize and dismiss failures
 - We distort actual events in our favor
 - You can enhance your ability to learn from experience by doing a few simple things. First of all, keep track of your advice. Second, think about how past events might have turned out differently. Research has shown that you can reduce hindsight biases by looking at how the results of decisions could have been different.
- Here are some suggestions for improving your decision-making ability:
 - Over-invest in problem identification. It is a dangerous mistake to accept your client's first "problem statement" at face value.
 - Examine alternative problem definitions. Be creative in examining all the root causes of the issue at hand.
 - Make sure the problem is really a priority
 - Ask disconfirming questions. You can avoid the confirmation judgment trap by asking questions and collecting data you suspect might disprove the initial hypothesis.
 - Develop both standard and outlandish alternatives.
 - Engage in prospective hindsight. When a hypothetical event is stated as a reality people are far more creative in coming up with reasons for why it could happen, and the quality of their thinking improves dramatically.
 - Understand your client's tolerance for risk and uncertainty.
 - Enhance your ability to reach for patterns in your experience. Get your peers to share stories and anecdotes. Stories are a powerful way to enhance your experience.
- Good judgment flourishes in the absence of bad judgments. Great professionals help their clients avoid the many subtle judgment traps that can lead to poor decisions. Then they actively exploit each part of the judgment equation in a balanced fashion. They combine known facts with their experience and assess the alternatives through the lens of their beliefs and values.
- By becoming a deep generalist. Cultivating your powers of synthesis and developing good judgment, you will be well on the road to becoming a good thinker. If you are not only able to

demonstrate sound judgment yourself but also help your clients arrive at their own good judgments, your value as an adviser will increase significantly.

The Powers of Conviction: Drawing Strength from Your Values

- One of the strongest common denominators among the hundreds of extraordinary professionals the authors have observed and studied is the intensity of their convictions. Like a powerful elixir, conviction impels us to accomplish great things. It amplifies our other qualities and enables us to push to our limits. If we have a good idea, it becomes twice as powerful if it is backed with conviction. If we have a difficult goal to achieve, it is conviction that enables us to persist through setbacks and obstacles.
- Clients recognize and are deeply affected by the power of conviction.
- The word "conviction" is derived from the Latin word *convictum*, which means "that which is proven or demonstrated." A personal conviction thus has the sense of a belief based on something you have proven or demonstrated to yourself. To *convince*, which is the next step after formulating your own convictions, has associations with the Latin verb *vincere*, "to win." Not only do great professionals have strong convictions, but they are skilled at winning over or persuading their clients.
- Conviction also has to be accompanied by integrity. Great professionals, therefore, have convictions that are ethical and moral. Conviction is fundamentally rooted in three aspects of personality: your own particular set of personal experiences; your beliefs and values; and your sense of mission. Finally, your daily conviction is intensified and supported by your ability to read audiences, the sharpness of your communications skills, and the palpable energy you marshal behind your words.
- Conviction is, ultimately, belief in yourself and your abilities. When you know what you stand for and feel strongly about it, you become a confident, convincing, and persuasive individual. You radiate a genuine assuredness that is attractive to colleagues and clients alike. It gives you the strength to exercise the independence and objectivity that are hallmarks of great client advisers.
- The sources of your belief can be varied. They can spring from a religious upbringing, from a particular type of family experience, or from tragedy.
- Personal experiences inexorably lead to the creation of each person's set of core values and beliefs. Individuals with great conviction are able to tap into these experiences, frame them in a positive light, and then walk away with an explicit understanding of the values and beliefs that naturally flow from them.
- From our unique life experiences and the belief system that emerges from them, each of us discerns a sense of mission that guides and drives us. This mission is the final element that defines our personal conviction. If we don't have a clear idea about where we're headed and what our purpose is, it's hard to have a great deal of conviction and confidence.
- Personal conviction-knowing what you believe in-gives you a sense of self-assurance and confidence that underlies your daily conviction about the issues and problems your client faces. In other words, if you are certain in your core being, you will be able to radiate confidence about your opinions and findings.

- Daily conviction is also strengthened by honing your judgment skills. When your judgments are informed equally by fact and experience and tempered by your value system, your confidence in your own opinions and views will rise.
- There are, in addition, several enablers of your daily conviction -skills that enable you to be convincing and persuasive when you express a view. These include:
 - *Empathy for your audience.* No matter how you plan your communication, you have to be prepared to change tactics on the spur of the moment.
 - *Communication skills.* You won't convince anyone of anything if you can't communicate effectively. You have to be able to organize your thoughts and summarize the key points you are making both before and after you elaborate on your arguments.
 - *Energy.* Clients have to sense your energy when you speak or write-your enthusiasm and belief need to be tangible and genuine.
- Sometimes, professionals have trouble being convincing. The lack of conviction is due to self-erected barriers. Here are four typical ones:
 - *"I'm not an expert."* Often, professionals feel they can opine only in areas where they possess deep expertise. The best client advisers, however, combine knowledge depth and breadth with a broad-based understanding of their client's industry, company, and organization. This combination enables them to provide useful advice and perspectives that go beyond just the technical details of the assignment. They know that simply asking good questions and applying common sense are often more powerful than expertise.
 - *"I might be wrong."* Of course you might. But when you *believe* something is true or right-based on your assessment of the facts and your intuition-you have to express, conviction.
 - *"I don't have enough information."* You will never have all the facts. You can always frame your opinion with some qualification-"This is my preliminary view" -but it still has to be conveyed with conviction, not insecurity.
 - *"My client's conviction is far greater"*
- Just like corporate leaders, professionals have to win over others to their point of view in order to be effective, but because they're outsiders, their task can be even harder.
- There are a number of specific things you can do to increase and intensify your own conviction:
 - *Get in touch with your core values and beliefs.* Try to summarize what you've learned. Can you create a list of five or six core values that implicitly guide your behavior and decision making? Can you identify three or four of your beliefs that you follow in your professional life?
 - *Use your integrity to screen your convictions.*
 - *Employ logic as well as facts.* If your conviction is based on solid principles and well-reasoned logic-and you have some key facts at your disposal as well-you will be far more effective in persuading clients than if you just bombard them with statistics.
 - *Have a clear message.*
 - *Focus on your passion.* People who are *passionate* are convincing. That's why it's so important for professionals to identify and gravitate toward an area of interest that really excites them.
 - *Choose to believe.* The beliefs and values that drive your conviction have to come from

within you, but often it requires an act of will and a conscious choice to decide that you will never compromise your integrity or that you will apply a standard of excellence to everything you do professionally.

- *Test and challenge your convictions.* Convictions don't have to remain unchanged throughout your entire life.
- If you get in touch with your own beliefs and express yourself with conviction that is surrounded by passion, energy, and clarity, you'll be surprised at how effective you can be with your clients. You will become energized, and your other strengths will be amplified and sharpened.

What Money Cannot Buy: Creating Trust through Integrity

- A lack of trust in business and personal dealings carries many costs. Corporate managers and public officials, for example, are reluctant to share information that could empower the organizations, resulting in sharply reduced employee loyalty. Transaction costs, such as legal fees and overly detailed contracting, are major expenses for both corporations and individuals. And because of a fear that they will be sued, many employers refuse to give recommendations for former employees-the two parties, in essence, don't trust each other. Litigation against large professional service firms, once rare, has become commonplace.
- Great professionals, however, never concede their integrity in order to win. They may be bold and determined in pursuit of their objectives, but integrity and their clients' needs-not selling the next assignment, not earning a large bonus, not pleasing their boss-come first. And if there ever is a conflict between the two-between what a client wants and what the professional's integrity dictates-integrity always wins out.
- Trust between a client and a professional is both a necessity and an important asset for both parties: if there is mutual trust, everything works better, faster, and more smoothly. Trust is complex: in some situations, it means "I believe you are competent to perform this service"; in others, "I know you will act in my interests, not yours."
- If we examine any business relationship with a high degree of trust-several factors stand out that uniquely affect the level of trust that a client has in you. The first major quality that underpins trust is integrity. An additional factor that builds trust: competence
- These three factors-integrity, competence, and risk can be combined into a trust formula:

$$\text{Trust} = \frac{\text{Integrity} \times \text{Competence}}{\text{Risk}}$$

- Your clients' perception of each factor in the equation will raise or lower the trust they place in you.
- Integrity is a state of wholeness in which you act in accordance with a set of coherent values or principles.
- Integrity has several main dimensions to it. The first, according to Yale law professor Stephen Carter, is discernment between right and wrong. Just acting consistently with your beliefs is not enough; you have to have beliefs that are ethical and moral.
- Discretion is a second dimension of integrity that is of particular importance to clients. It is not surprising that people in positions of responsibility and authority look for advisers who can keep confidential information to themselves. In corporations and professional firms, an

- indiscretion can result in major losses.
- Many professionals, however, can't seem to resist the temptation to exploit confidential information for their own benefit. In some cases they use confidential information to enhance personal standing, power, and prestige in the eyes of clients, others in the organization, or even friends at social gatherings.
 - A client has to feel that when you say you'll do something, you'll follow through-always. Absolute dependability greatly reinforces people's belief in your integrity.
 - Consistency makes you predictable to your client, and it reinforces the feeling that you have integrity, that you don't change your beliefs or principles on a situation-by-situation basis, but rather consistently apply them. Consistency has several dimensions. It means that:
 - You remain true to your beliefs and views, no matter whom you are talking with.
 - Your habits are consistent
 - You treat people consistently, regardless of rank or position.
 - When you are inconsistent, your clarity about who you are and what you stand for is diminished. A final aspect of integrity that is proposed by Yale's Professor Stephen Carter is that you are willing to act on your beliefs. In other words, it's not enough to have good intentions-you have to be prepared to put them into action and potentially suffer losses.
 - Competence is the third term in the trust equation.
 - A client's trust will vary depending on the perception of the risk of trusting you. Perceived risk can be based on many factors-belief in your competence, the absolute importance of the task, and a client's past experience with your integrity (how discreet, reliable, and consistent have you been). High perceived risk reduces trust; conversely, professionals can increase trust by decreasing the amount of risk for the client.
 - Joseph Badaracco of Harvard Business School recommends, in his book *Defining Moments*, that you ask yourself four questions to help determine your response to an ethical dilemma. These questions very nicely weave together some of the best historical thinking on ethics with the modern, individualistic need for each of us to find our own way:
 - How do my feelings and instincts define the dilemma?
 - Which of the responsibilities and values in conflict have the deepest roots in my life and in communities I care about?
 - Looking to the future, what is my way?
 - How can expedience and shrewdness, along with imagination and boldness, move me toward the goals I care about most strongly?
 - Remember that while we're talking here about dilemmas you encounter professionally, there should be little or no distinction between how you handle your personal life and your professional life. You will be a more integrated professional if similar principles guide both your professional and personal behavior.
 - Lots of small things go into building trust. Here are some areas to consider:
 - Face time with clients - There is simply no substitute for meeting with a client and allowing time so that the two of you can come to know each other personally. If, however, there is personal chemistry, as well as shared values and interests, personal time together will bring this out, and it will subtly facilitate the development of trust.
 - Setting and reviewing expectations

- Carefully making promises. Here are some suggestions for how to keep commitments:
 - Don't be cavalier with promises
 - If necessary, make conditional agreements
 - If you can't keep a promise, let the other person know as early as possible
 - Learn to say no,
- Demonstrating loyalty - Loyalty means having an allegiance to your client and putting her agenda before your own. It's also important never to criticize anyone who is not present. You win the trust of the people you're with by showing loyalty to those who aren't there.
- Nurturing trust on a daily basis- Stephen Covey's metaphor for this reservoir of trust is the emotional bank account. When an action reinforces trust, you have made a deposit; when you do something to undermine trust, such as letting someone down, you make a withdrawal. You have to make lots of deposits, regularly, to sustain trust.
- There are no "Minor" commitments- Each promise you make, large or small, should be treated with the same seriousness
- Knowing what you stand for. By definition, integrity is a wholeness or completeness that is underpinned and bounded by a set of beliefs and values. What are your principles? What do you stand for? What guides your professional and personal life?
- Being prepared to talk on TV - What if you were interviewed on television and asked about something you did? Would you feel comfortable explaining it? You should have nothing to hide; you should be comfortable sharing details of your professional conduct with a client, without embarrassment or defensiveness.
- Reducing your client's risk – First of all, you have to demonstrate consistency and reliability right from the start, even for the smallest of things. Showing integrity itself, in other words, reduces risk. Second, you can either implicitly or explicitly guarantee your work. The words "we'll work on this until you're satisfied" can be the occasional reminder of the fact that you'll stand behind your work and strive to address any issues that they may have with your performance.
- Sometimes, even though you feel you have demonstrated a high level of integrity and competence, trust is lost. Here are some principles to remember about losing trust:
 - *Clients don't inform you when they stop trusting you.* It's always hard to pinpoint when your client stops trusting you. Often a client can't even articulate that she's lost trust in you. It's useful to hold a frank and open discussion with your client when the engagement ends, something that is easier to do if you set the expectation up front, that you'll be having this discussion three or six months down the road.
 - *Clients don't care why you let them down.*
 - *Sometimes, repairing a lapse in trust can enhance your relationship.* If you let a client down, you may be able to recover her confidence. How you react to the incident and the way in which you go about remedying it are critically important. Some cardinal rules for dealing with a breach of trust:
 - Admit that you've made a mistake. Own up to the lapse.
 - Don't make excuses-no one wants to hear them.
 - Provide value added compensation to the client

- Learn from the incident, and let your client know that you are learning from it.

Pitfalls and Dilemmas: Avoiding the land mines in client relationships

- Based on the authors' discussions with many extraordinary professionals and demanding clients, as well as on their own experiences as advisers, they've identified the most important pitfalls for professionals. The first set of pitfalls relates to the seven attributes described in this book. The second set concerns either difficult situations or types of advisers and clients that should be avoided.
- The talents, skills, and attitudes of great professionals neatly combine into a powerful whole when they are expressed with balance and moderation. When individual attributes are taken to either negative or positive extremes, however, the result is dysfunctional and even neurotic behavior. The trick is to achieve equilibrium.
 - *Selfless independence* is by definition a delicate balance between client dedication and detachment. When this balance is not achieved, professionals veer toward one extreme or the other.
 - When *empathy* is in balance you are able to tune into your client's feelings, thoughts, and context. You have an attitude of healthy humility; you demonstrate strong self-awareness and self-control; and you benefit from well-honed listening skills. When you have too much empathy, you overly identify with your client. You lose your objectivity.
 - A *deep generalist* in balance is a professional with a passion for learning, who has great expertise in one subject but also deep knowledge about his clients, the industries he works in, and the business functions that influence his work. When learning becomes superficial or overly broad, however, there is imbalance.
 - A good *big-picture thinker* has strong powers of analysis *and* synthesis. She identifies critical issues, sees the whole picture, and then uses a variety of tools for synthesis such as analogies, frameworks, multiple perspectives, and pattern recognition.
 - If you have a positive imbalance of *synthesis*-too much big-picture thinking-you develop a generalized understanding of the problem with no appreciation of the details. If you undertake too little synthesis, you'll remain forever at the level of analysis. When a professional has balanced *judgment*, he carefully blends facts, experience, and personal values to arrive at sound decisions. When judgment is out of balance, the tendency is either to become paralyzed or to rush to judgment too quickly.
 - Strong, genuine *conviction* that is balanced drives extraordinary performance. It is rooted in deeply held beliefs and values and an accompanying sense of mission. Too much conviction results in closed-mindedness, dogma, and overconfidence.
 - When *trust* is in balance in a relationship, there is openness between professional and client. An imbalance in trust can occur in several ways. One party may blindly trust the other, for example, without reciprocity, resulting in disillusionment and disappointment. Integrity can also be taken to extremes. An exaggerated sense of integrity can make you uncompromising and lead to a confusion between standards and principles.
- In addition to errors of imbalance that professionals can make as they develop and practice the seven attributes, there are frequent pitfalls and dilemmas in client relationships. The first group of these represents what we call "traps" and even the best professionals and clients fall into them:
 - *The Wrong Client* - The right client is the individual who owns the problem at hand, can act on your recommendations, and can authorize your fees or payments.

- *The Wrong Problem* - The great client advisers we've studied constantly ask themselves: Am I working on the right problem? Have I defined the problem correctly?
- *The Wrong Adviser* - Smart, well-educated professionals feel that they ought to have something intelligent to say about everything. The really smart ones, though, know when *not* to give advice, and they admit when there is a mismatch between their expertise and experience and the client's problem. One of the best ways to earn respect and trust from a client is to be honest about your capabilities and to recommend other qualified professionals if you're not the right person for the job.
- *Vicariously Exercising Power or Expertise* - Professionals sometimes invoke the name and authority of their client to obtain respect and support in the organization. At other times the client executive himself may use the expertise and opinion of the professional adviser to shore up his own position.
- *Too Much Bad News* – Clients have a limited "bandwidth for bad news." It's at the beginning, when they are receptive and open. You have to choose your battles carefully
- *Staying in a bad marriage* -Sometimes the personal chemistry between professional and client is just plain lousy. If you find yourself in a bad relationship with a client, try to ascertain if it's fixable or whether you are just incompatible.
- *Accepting opinions and judgments at face value* - Great professionals constantly challenge what they see and hear. They accept very little at face value, especially when it comes to people's character and competency. You can make business mistakes, and this is natural-there's always risk in business decision making. But you don't want to misjudge people. You become a trusted confidant of that individual, privy to highly confidential information. Others may now hesitate to open up to you for fear that what they say may get passed on to their boss. If you don't have broader support in the organization, it will be harder to get your ideas implemented, even if you have a strong energetic client.
- Here are the six types of ineffective professionals:
 - *Agenda pushers* – these are professionals who are focused on what they want and need rather than on the client's agenda.
 - *One size fits all* – these professionals grab on to one solution that works one place and then try to sell it everywhere.
 - *Gurus* – these are professionals with a set of acclaimed "hot" ideas that they market from coast to coast in speeches and seminars. But many leaders felt that they are ineffective as valued client advisers and can even mislead an organization. The outstanding professionals, in contrast, offer advice and insights that are more specific and practical. They address your context.
 - *Crowd pleasers* – these are the advisers who tell their clients exactly what they want to hear.
 - *Crowd followers* – Out of insecurity, lack of imagination, or just plain conservatism, some professionals always advise their clients to go with the crowd, and they stick to preconceived notions about the right solution.
 - *Recyclers* – clients want services tailored to their particular situation, not recycled, boilerplate advice.
- Just as clients recognize types of advisers, many of the extraordinary professionals with whom the authors spoke pointed out several kinds of ineffective clients.
 - Some clients go through the motions of hiring professionals, listen carefully to their recommendations, but never act on the advice they're given,
 - There are those clients, who just never listen. They have a retort for everything you say.
 - If a client constantly demonstrates bad judgment, it becomes impossible to advise them.

- Most people want confirmation, not advice.
- Some clients treat educated professionals like pencils, a commodity to be bargained for and bought from the cheapest source.
- Clients do, from time to time, exploit the professionals they work with. What usually takes place is that they undervalue your time and ideas. You should always be prepared to give some free advice-to provide, even, some services without charge-but be careful. Know the person with whom you are dealing. A professional who works to add extra value in an effort to exceed client expectations can also become exploited.

The Soul of the Great Professional

- Great professionals become extraordinary client advisers by developing the seven attributes that are the centerpiece of this book. These attributes encompass the important talents, skills, and attitudes that enable professionals in any field to build and sustain long-term, broad-gauge client relationships on a consistent basis.
- The great advisers studied also possess certain outlooks that frame and inform their work. The authors call these outlooks the *soul* of the great professional. They are not so much personal characteristics as they are ways of looking at the world. If you cultivate them, your ability to add value will be enhanced, and you'll become a more appealing person to your clients;- someone they will both respect and enjoy spending time with. In addition, you'll be better able to shape and manage your own career.
- Great professionals have an *abundance* mentality. An abundance mentality allows you to see the possibilities and opportunities inherent in every situation. The opposite is a *scarcity* mentality, which focuses on limitations and risks.
- The professionals who perceive abundance often have a healthy dissatisfaction with the way things are done today. They know there's often a better solution. Like strong organizational leaders, they push and stretch for new ideas and innovations; they don't wait for them to float down from the sky. That's why clients like having them around so much: these professionals constantly energize, motivate, and inspire others.
- The sources of your fundamental outlook on life- abundance versus scarcity- are varied and complex. Your early childhood experiences and upbringing as well as your education, play a critical role.
- Great professionals have a mission orientation
- Great professionals channel adversity into wisdom and confidence.
- Great professionals always view old clients as new clients - When the authors look at professionals who have long-term, broad-based client relationships, who inspire great client loyalty, they all have a similar approach: they treat each assignment as if it were the first one for that client. They bring the same energy, creativity, and drive to their long-term clients as they do to the new client they are trying to impress.
- Great professionals engage in continual self-renewal. Just as successful professionals take a long-term view of client relationships, they also have a multiyear perspective on their own personal and professional development. Great professionals successfully develop and integrate the seven core attributes into a powerful whole, and then infuse everything they do with their soul of abundance, mission, and self-renewal.
- Here are some immediate steps you can take to develop more of the deep, enduring relationships that have been talked.
 - Examine each of your client relationships through the lens of the seven attributes. If you critically assess your performance with respect to each of the attributes, you will

- probably discover that there are a number of actions you can take to enhance and strengthen both the client relationship and your ability to add insight.
- Determine what role you're currently playing with each of your clients-expert for hire, steady supplier, or trusted adviser.

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About the reviewer: Frumi Rachel Barr, MBA, PhD

Many CEO's find themselves asking "What now?" to sensitive situations that only an experienced former CEO can understand. Frumi is brought in to solve problems and often remains to work with you, as your confidante and secret weapon. She has an uncanny knack of getting to the heart of your corporate climate and maximizing your team's performance, profitability and sustainability.

To schedule a free *Break From the Pack to Success* consultation email ceocondfidante@frumi.com or call 949-729-1577