

DAVID MAISTER

PRESENTATION HANDOUTS > CLIENTS

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POSITIONING YOUR PRACTICE

	Familiar, execution-intensive assignments	Frontier, customized, one-of-a-kind assignments
High degree of client contact. Client wants results AND interaction	COUNSELING NURSE 	DIAGNOSIS FAMILY DOCTOR 
Low degree of client contact. Client focuses on results only	EFFICIENCY PHARMACIST 	CREATIVITY BRAIN SURGEON 

WHAT TYPE OF PROVIDER DOES YOUR CLIENT WANT TO BUY?

WHAT TYPE OF PROVIDER ARE YOU?

Source: David H. Maister, True Professionalism, Free Press, 1997

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WHAT IT FEELS LIKE TO BE A BUYER

1. I'm feeling **INSECURE**. I'm not sure I know how to detect which of the finalists is the genius, and which is just good. I've exhausted my abilities to make technical distinctions.
2. I'm feeling **THREATENED**. This is my area of responsibility, and even though intellectually I know I need outside expertise, emotionally its not comfortable to put my affairs in the hands of others.
3. I'm taking a **PERSONAL RISK**. By putting my affairs in the hands of someone else, I risk losing control.
4. I'm **IMPATIENT**. I didn't call in someone at the first sign of symptoms (or opportunity). I've been thinking about this for a while.
5. I'm **WORRIED**. By the very fact of suggesting improvements or changes, these people going to be implying that I haven't been doing it right up till now. Are these people going to be on my side?
6. I'm **EXPOSED**. Whoever I hire, I'm going to have to reveal some proprietary secrets, not all of which are flattering. I will have to undress.
7. I'm feeling **IGNORANT**, and don't like the feeling. I don't know if I've got a simple problem or a complex one. I'm not sure I can trust them to be honest about that: it's in their interest to convince me its complex.
8. I'm **SKEPTICAL**. I've been burned before by these kinds of people. You get a lot of promises: How do I know whose promise I should buy?
9. I'm **CONCERNED** that they either can't or won't take the time to understand what makes my situation special. They'll try to sell me what they've got rather than what I need.
10. I'm **SUSPICIOUS**. Will they be those typical professionals who are hard to get hold of, who are patronizing, who leave you out of the loop, who befuddle you with jargon, who don't explain what they're doing or why, who ..., who, who ...? In short, will these people deal with me in the way I want to be dealt with?

Source: David H. Maister, Managing the Professional Service Firm, 1993

THE PRACTICE DEVELOPMENT PACKAGE

1. Listening
(Learning how clients think)
2. Superpleasing
(Existing client, on the current assignment)
3. Nurturing
(Existing client, off the current assignment)
4. Courting
(Turning existing new client leads into assignments)
5. Broadcasting
(Generating new leads)

WHAT PERCENTAGE OF YOUR BUSINESS DEVELOPMENT
TIME DO YOU SPEND ON EACH OF THESE STAGES?

HOW MUCH SHOULD YOU SPEND?

Source: David H. Maister, Managing the Professional Service Firm, 1993

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TACTICS FOR “LISTENING TO CLIENTS”

How to get your clients to tell you how to improve, what they would pay higher fees for, what they have difficulty getting from your competitors and what they think of your strategic plans.

CLIENT PANELS

REVERSE SEMINARS

USER GROUPS

ENGAGEMENT DEBRIEFINGS

SENIOR PROFESSIONAL VISITS

ATTENDING INDUSTRY MEETINGS WITH CLIENTS

OPINION SURVEYS

FEEDBACK QUESTIONNAIRES

Source: David H. Maister, Managing the Professional Service Firm, 1993

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WHERE IS THERE THE BEST RETURN ON INVESTMENT?

	Existing Client	New Prospect
Aware of a Need		
Not Aware of a Need		

SOME FACTORS THAT INFLUENCE ROI:

Degree Of Competition

Fee Sensitivity

Likely Profitability Of The Work

Likelihood Of Work Being Asset-building

Investment Of Time Required To Win Work

How Likely We Are To Have A Favored Position

Source: David H. Maister, Managing the Professional Service Firm, 1993

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WHAT WE HATE ABOUT “THOSE GUYS”

(when we are the client)

1. Pompous, Patronizing, Condescending
2. Talk in Jargon
3. Don't Listen well
4. Don't Explain: make no effort to help me understand
5. Often Inaccessible
6. Focus on the disease not the patient
7. Treat me like a job, not a person
8. Don't act like a person
9. Make it hard to ask them questions
10. Rush to judgment
11. Apply standard processes, don't make me feel as if they're customizing to me
12. Ignore my feelings and treat the issues as if they are purely technical
13. Care about the problem, but not about me

MANAGING EXPECTATIONS

1. The Boundaries Of Your Analysis
2. True Objectives Of The Project
3. Kind Of Information You Will Use
4. Your Role In The Project, Role Of Staff
5. The Product You Will Deliver
6. What Support And Involvement You Need From Client
7. Time Schedule
8. Frequency And Form Of Communication

SOURCE: Adapted from PETER BLOCK, FLAWLESS CONSULTING

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WHAT DOES THE CLIENT WANT?

THAT “SOLUTION” WHICH . . .

1. Most Permanent Impact
2. Has Quickest Impact
3. Least Up Front Cost
4. Quickest Payback
5. Involves Least Effort By Me
6. Most Visible To Key People
7. Least Disruptive
8. Easiest To Implement

Source: David H. Maister, True Professionalism, Free Press, 1997

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FACTORS AFFECTING CLIENT PERCEPTIONS OF VALUE

1. UNDERSTANDING AND EXPLANATION
2. SENSE OF CONTROL
3. SENSE OF PROGRESS
4. ACCESS AND AVAILABILITY
5. RESPONSIVENESS
6. RELIABILITY
7. APPRECIATION
8. SENSE OF IMPORTANCE
9. RESPECT

Source: David H. Maister, Managing the Professional Service Firm, 1993

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SOME OPPORTUNITIES FOR VALUE ENHANCEMENT

1. Involve Client More In Process
2. Keep Client Informed On What's Going To Happen, When And Why
3. Make Reports And Presentations More Useful, Easier To Pass On
4. Coach Client In How To Use What We Deliver
5. Make Meetings More Useful To Client
6. Learn To Persuade, Not Assert
7. Facilitate Client Executive's Ability To Act On Our Work

Source: David H. Maister, Managing the Professional Service Firm, 1993

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SOME SPECIFIC VALUE ACTIONS

Dictate and transcribe summary of all meetings and significant phone conversations and send copy to client same or next day.

Involve client in process through:

- brainstorming sessions
- give client tasks to perform
- give client options and let client choose

Clear explanations and documentation of what is going to happen: make sure process is understood in advance. If appropriate, develop printed booklet laying this out.

Making meetings more valuable:

- Establish specific agenda and goals prior to meeting
- Send info, reports in advance - save meeting time for discussion, not presentation
- Find out attendees in advance, research them
- Take charge of meeting room logistics
- Always establish next steps for both sides
- Call afterwards to confirm that goals were met

Making reports more valuable:

- Get client to instruct us on format, presentation
- Provide summary so client can use it internally without modification
- Have all reports read by non-project person to ensure readability, comprehension prior to delivery
- Provide all charts, tables, summaries on overheads for internal client use

Progress summaries: write them in a fashion that client can use internally without modification

Helping client use what we deliver:

- Coach client in dealing with others in client organization
- Empower client with reasoning steps
- Advise on tactics/politics of how results should be shared inside client organization

Access and availability

- Home phone numbers
- Anticipatory calling when we're going to be unavailable
- Ensure that secretaries know where we are and when we'll be back
- Ensure that secretaries know names of all clients and names of all team members on the account
- Work at getting clients comfortable with our "junior" personnel", so they can be available when we're not

Source: David H. Maister, Managing the Professional Service Firm, 1993

CLIENT SERVICE QUESTIONNAIRE

If a business acquaintance asked you about your experience with us, would you give us an unqualified endorsement?

For each of the following statements about our firm, please indicate whether you: strongly disagree (1); somewhat disagree (2); neither agree nor disagree (3); somewhat agree (4); strongly agree (5)

- ___ You are thorough in your approach to your work
- ___ You show creativity in your proposed solutions
- ___ You are helpful in redefining our view of our situation
- ___ You are helpful in diagnosing the causes of our problem areas
- ___ You staff my work well: there is enough senior time
- ___ You staff my work well: you don't have high-priced people doing junior tasks
- ___ Your people are accessible
- ___ You keep your promises on deadlines
- ___ You document your work activities well
- ___ Your communications are free of jargon
- ___ You offer fast turnaround when requested
- ___ You listen well to what we have to say
- ___ You relate well to our people
- ___ You keep me sufficiently informed on progress
- ___ You let us know in advance what you're going to do
- ___ You notify us promptly of changes in scope, and seek our approval
- ___ You give good explanations of what you've done and why
- ___ You don't wait for me to initiate everything: you anticipate
- ___ You involve us at major points in the engagement
- ___ You have a good understanding of our business
- ___ You make it your business to understand our company
- ___ You are up to date on what's going on in our world
- ___ You make us feel as if we're important to you
- ___ You deal with problems in our relationship openly and quickly
- ___ You keep us informed on technical issues affecting our business
- ___ You show an interest in us beyond the specifics of your tasks

Source: David H. Maister, Managing the Professional Service Firm, 1993

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FUNDAMENTAL PRINCIPLES OF CLIENT DEVELOPMENT

ANY RELATIONSHIP BUILDING ACTION MUST PASS
THREE TESTS:

1. Does it allow you to be seen to be generous with your time and help?
2. Does it allow you to illustrate your ability to help?
3. Does it allow you to get a better understanding of their situation?
 1. Getting hired is about EARNING and DESERVING trust. (What makes YOU trust someone?)
 2. To earn a relationship, you must go first: Give a favor to get a favor. The one you are trying to influence must visibly perceive that you are willing to be the first to make an investment in the relationship.
 3. To make anyone believe something about you, you must demonstrate, not assert: Illustrate, don't tell.
 4. A primary goal of relationship building is to create opportunities to demonstrate that you have something to contribute.
 5. Before you can help someone, you need to understand what's on their mind You must create situations where they will tell you more about their issues, concerns and needs.

Source: David H. Maister, Managing the Professional Service Firm, 1993

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CLIENT SUGGESTIONS FOR RELATIONSHIP-BUILDING

1. Make an impact on our business, don't just be visible;
2. Do more things "on spec" (i.e. invest your time on preliminary work in new areas);
3. Spend more time helping us think, and helping us develop strategies;
4. Lead our thinking. Tell us what our business is going to look like five or ten years from now;
5. JUMP on any new pieces of information we have, so you can stay up-to-date on what's going on in our business. Use our data to give us an extra level of analysis. Ask for it, don't wait for us to give it to you;
6. Schedule some offsite meetings together. Join us for brainstorming sessions about our business;
7. Make an extra effort to understand how our business works: sit in on our meetings;
8. Provide more benchmarking studies, comparing us to our competitors;
9. Tell me why our competitors are doing what they're doing;
10. Discuss with us other things we should be doing; we welcome any and all ideas!

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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RULES OF ROMANCE (RELATIONSHIP BUILDING)

1. Go First
2. Illustrate, don't tell.
3. Listen for What's Different, Not for What's Familiar
4. Be Sure Your Advice is Being Sought
5. Earn the Right to Offer Advice
6. Keep Asking
7. Say What you Mean
8. When You Need Help, Ask For It
9. Show an Interest in the Person
10. Use Compliments, Not Flattery
11. Show Appreciation

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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SOME RULES TO BUILD A GREAT RELATIONSHIP

1. You need to be available as a sounding board to your romantic partner. You don't need to be critical. Listen before you react.
2. Work really hard at listening and understanding
3. Do the unexpected occasionally; don't take each other for granted
4. Discuss your common values
5. Communicate honestly, openly and frequently
6. Spend time with each other, with no agenda
7. Show your appreciation regularly, but not in a formulaic way
8. Find ways to have fun together
9. Don't let problems fester. Catch them and discuss them early
10. Show Interest
11. Understand
12. Spend time off the issue
13. Give of yourself

Source: McKenna and Maister, First Among Equals, Free Press, 2002

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THE KEYS TO A GREAT RELATIONSHIP

Considerate

Understanding

Respectful

Supportive

Empathetic

Sympathetic

Sensitive

Dependable

Responsive

Appreciative

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THE MORE YOUR CLIENTS TRUST YOU, THE MORE THEY WILL:

1. Reach for your advice
2. Be inclined to accept and act on your recommendations
3. Bring you in on more advanced, complex, strategic issues
4. Treat you as you wish to be treated
5. Respect you
6. Share more information that helps you to help them, and improves the quality of the service you provide
7. Pay your bills without question
8. Refer you to their friends and business acquaintances
9. Lower the level of stress in your interactions
10. Give you the benefit of the doubt
11. Forgive you when you make a mistake
12. Protect you when you need it (even from their own organization)
13. Warn you of dangers that you might avoid
14. Be comfortable and allow you to be comfortable
15. Involve you early on when their issues begin to form, rather than later in the process (or maybe even call you first!)
16. Trust your instincts and judgments (including those about other people such as your colleagues and theirs)

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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EXPERT OR ADVISOR?

EXPERT	ADVISOR
Goal is to be right	Goal is to help
Provides Answers	Provides Understanding, Reasoning, Insight
Solves Problem	Helps Clients Make Own Decisions
In Charge / In Control	An Aide to the Principal
Deals with Logic	Deals with Logic and Clients' Emotions and Psychology
Decides	Proposes
Works out of contact with client (except at beginning and end)	Teams with Client throughout process

WHY WE PUT BARRIERS BETWEEN CLIENTS AND OURSELVES

1. One night stand v. romance attitudes
2. Clients treat us with suspicion and we're just reacting to that
3. Consultant resents being servant, feels superior to client
4. Consultant doesn't like feeling of dependency, loss of control
5. Firm sends clear signal that client is to be valued only to the extent that s/he is useful to us (instrumental)
6. The "Other" as object, means to an end
7. Fears—rejection, being wrong, mistakes, etc.
8. Overly self-focused; world revolves around me

Transactions

Relationships

One Night Stand	Romance
Them	Us
Opposites	On the same side
Short-term benefit	Long-term benefit
Suspicion	Trust
Goal is to make yourself look attractive	Goal is to understand the other party
Negotiate and bargain	Give and be helpful
Preserve options, avoid obligations	Make a commitment
Focus on the present	Focus on the future
Develop a detailed contract	Be comfortable with ambiguous understandings about future reciprocity
Main goal is to prevail	Main goal is to preserve the relationship
Style can be impersonal, detached	Style must be personal, engaged, intimate
Preparation, Rehearsal	In the moment
Listen to what they're saying	Listen to what they're feeling, why they're saying it
Usual feeling during interaction is tense, enervated	Usual feeling is relaxed, comfortable
Interactive style is defensive, protective	Interactive style is open, inquisitive

THE TRUSTED ADVISOR APPROACH

Help the client understand the options

Help the client evaluate the options

Provide a recommendation

Let the client choose

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A TALENT FOR FRIENDSHIP

Interested in others for their own sake (not instrumentally)

Happy to let others talk about themselves

Work at staying in touch

Considerate

Understanding

Thoughtful

Supportive

Upbeat, optimistic

Enter their world, don't force them to enter yours

Be there in times of need

Develop routines and joint habits

Create a shared history

Celebrate each others' small triumphs

Do the inviting, don't wait to be invited

Find the joint interest

Get started with food (lunch, drinks, dinner)

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COMMON TRAITS OF TRUSTED ADVISORS

1. Seem to understand us, effortlessly, and like us
2. Are consistent: We can depend on them
3. Always help us see things from fresh perspectives
4. Don't try to force things on us
5. Help us think things through (it's our decision)
6. Don't substitute their judgment for ours
7. Don't panic or get overemotional. They stay calm
8. Help us **THINK** and separate our logic from our emotion
9. Criticize and correct us gently, lovingly
10. Don't pull their punches: we can rely on them to tell us the truth
11. Are in it for the long haul (the relationship is more important than the current issue)
12. Give us reasoning (to help us think) not just their conclusions
13. Give us options, increase our understanding of those options, give us their recommendation, and let us choose.
14. Challenge our assumptions: help us uncover the false assumptions we've been working under
15. Make us feel comfortable and casual personally, (but they take the issues seriously)
16. Act like a person, not someone in a role
17. Are reliably on our side, and always seem to have our interests at heart
18. Remember everything we ever said (without notes)
19. Are always honorable: they don't gossip about others (we trust their values)
20. Help us put our issues in context, often through the use of metaphors, stories and anecdotes (Few problems are completely unique)
21. Have a sense of humor to diffuse (our) tension in tough situations
22. Are smart (sometimes in ways we're not)

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

COMMON ASPECTS OF TRUSTED ADVISORS

1. Focus on the client, rather than themselves.
2. Have enough self-confidence to listen without pre-judging.
3. Have enough curiosity to inquire without supposing an answer.
4. Have willingness to see the client as co-equal in a joint journey.
5. Have enough ego strength to subordinate their own ego.
6. Focus on the client as an individual, not as a person fulfilling a role.
7. Believe that a continued focus on problem definition and resolution is as important as technical or content mastery.
8. Show a strong “competitive” drive aimed not at competitors, but at constantly finding new ways to be of greater service to the client.
9. Consistently focus on doing the next right thing, rather than on aiming for specific outcomes.
10. Are motivated more by an internalized drive to do the right thing than by their own organization’s rewards or dynamics.
11. View methodologies, models, management techniques and business processes as means to an end.
12. Believe that success in client relationships is tied to the accumulation of quality experiences.
13. Believe that both selling and serving are aspects of professionalism.
14. Believe that there is a distinction between a business life and a private life, but that both lives are very personal, i.e. human.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

WHAT GOOD LISTENERS DO

1. Probe for clarification
2. Listen for unvoiced emotions
3. Listen for the story
4. Summarize well
5. Empathize
6. Listen for what's different, not for what's familiar
7. Take it all seriously (they don't say, "you shouldn't worry about that".)
8. Spot hidden assumptions
9. Let the client "get it out of his/her system"
10. Ask: "How do you feel about that?"
11. Keep the client talking (What else have you considered?)
12. Keep asking for more detail that helps them understand
13. Get rid of distractions while listening
14. Focus on hearing your version first
15. Let you tell your story your way
16. Stand in your shoes, at least while they're listening
17. Ask you how you think they might be of help
18. Ask what you've thought of before telling you what they've thought of
19. Look at (not stare at) the client as he or she speaks
20. Look for "congruency" (or incongruity) between what the client says and how he/she gestures and postures.
21. Make it seem as if the client is the only thing that matters and that they have all the time in the world.
22. Encourage by nodding head or giving a slight smile
23. Are aware of and control their body movement (no moving around, shaking legs, fiddling with a paper clip.)

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

THE COMPONENTS OF TRUST

Credibility

Reliability

Intimacy

(A low level of) Self-orientation

$$\text{TRUST} = \frac{\text{C} + \text{R} + \text{I}}{\text{S}}$$

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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CLUES ABOUT EXCESSIVE SELF-ORIENTATION

1. A tendency to relate their stories to ourselves
2. A need to too-quickly finish their sentences for them
3. A need to fill empty spaces in conversations
4. A need to appear clever, bright, witty, etc.
5. An inability to provide a direct answer to a direct question
6. An unwillingness to say we don't know
7. Name-dropping of other clients
8. A recitation of qualifications
9. A tendency to give answers too quickly
10. A tendency to want to have the last word

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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THE 5-STEP TRUST BUILDING PROCESS

1. ENGAGE: Uses language of interest and concern

“I’ve been thinking about your competitors, and...”

“Your people have been telling me about..”

2. LISTEN: Uses language of understanding and empathy

“Tell me more...”

“What’s behind that?”

“Gosh, that must feel...”

3. FRAME: Uses language of perspective and candor

“I see three key themes emerging here...”

“You know, what’s tough to do here is..”

4. Jointly ENVISION: Uses language of possibility

“Wouldn’t it be great if...”

5. COMMIT: Uses language of joint exploration

“What would it take, for each of us, to.....”

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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COMMITMENT TOPICS

1. What's going to get in the way of getting this done?
2. What do we intend to do about it?
3. Who needs to be brought into the loop?
4. Who should do what part?
5. What information do we need
6. When shall we check in?
7. What are the key deadlines?

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

MANAGING EXPECTATIONS

1. Clearly articulate what we will do and won't do
2. Clearly articulate what the client will do and won't do
3. Define the boundaries of the analyses we will perform
4. Check with the client about areas that the client may not want us to get involved in, or any people the client does not want us to speak with
5. Identify precise working arrangements
6. Agree on methods and frequency of communicating
7. Decide who should get which reports
8. Agree how often a report should be delivered
9. Agree how any reports will get used
10. Agree what milestones and progress reviews are needed
11. Agree how success will be measured, both at the end and during the process

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

SOME TIPS ON ENHANCING CREDIBILITY:

1. Figure out how to tell as much truth as possible, except where to do so would injure others.
2. Don't tell lies, or even exaggerate. At all. Ever.
3. Avoid saying things that others might construe as lies.
4. Speak with expression, not monotonically. Use body language, eye contact, and vocal range. Show the client you have energy around the subject at hand.
5. Don't just cite references. Where it is genuinely possible to create mutual benefit, introduce your clients to each other; they will learn from each other, and you will have plenty of reflected credit in which to bask.
6. When you don't know, say so, quickly and directly.
7. Yes it's important to have them know your credentials. Just don't get silly by having all those initials and certifications appear after your name on your business card.
8. Relax. You know much more than you think you know. If you don't really belong there, then don't put yourself there in the first place.
9. Make sure you've done absolutely all your homework on the client company, the client marketplace and the client individual, and that it's absolutely up to the minute.
10. There's no reason to show off.
11. Love your topic. It will show.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

SOME THOUGHTS ON RELIABILITY:

1. Make specific commitments to your client around small things: getting that article by tomorrow, placing the call, writing the draft by Monday, looking up a reference. And then deliver on them, quietly, and on time.
2. Send meeting materials in advance, so that the client has the option of reviewing them in advance, saving meeting time for substantive discussions.
3. Make sure meetings have clear goals, not just agendas, and ensure the goals are met.
4. Use the client's "fit and feel" around terminology, style, formats, hours.
5. Review agendas with your client, before meetings, before phone calls, before discussions. Let your client know that they can expect you to always solicit his or her views on how time will be spent.
6. Re-confirm scheduled events before they happen. Announce changes to scheduled or committed dates *as soon as* they change.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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THREATS TO CLIENT FOCUS:

1. Selfishness
2. Self-consciousness
3. A need to appear on top of things
4. A desire to look intelligent
5. A to-do list on our mind that is a mile long
6. A desire to jump to the solution
7. A desire to win that exceeds the desire to help the client
8. A desire to be right
9. A desire to be seen to be right
10. Fears of various kinds: fear of ignorance, of not having the right answer, of not appearing intelligent, or being rejected, etc.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

EMOTIONS ONE MUST CONTROL

1. Wanting (needing?) to take credit for an idea.
2. Wanting to fill blank airtime with content.
3. Playing to our own insecurity by feeling we have to get all our credentials out there.
4. Wanting to put a cap on the problem so we can solve it later, without the pressure.
5. Wanting to hedge our answers in case we're wrong.
6. Wanting (too soon) to relate our own version of the client's story or problem.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

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THE QUICK-IMPACT LIST TO GAIN TRUST

1. Listen to everything.
2. Empathize. For real.
3. Note what they're feeling.
4. Build that Shared Agenda.
5. Take a point of view, for goodness' sake!
6. Take a personal risk.
7. Ask about a related area.
8. Ask great questions.
9. Give away ideas.
10. Return Calls Unbelievably Fast.
11. Relax your mind.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000

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TOP TEN THINGS TO REMIND YOURSELF

1. I don't have to prove myself every ten seconds.
2. I have a right to be here in this room, I can add value without worrying about it.
3. Shut up and repeat again and again: "Really? And then what happened?"
4. Also again and again: "Gee; what's behind that?"
5. Is my pulse racing? Why? Why not say so, and say why, out loud?
6. Have I earned the right yet to give an answer?
7. Am I trying in any way to win an argument? Turn it back into a conversation.
8. Emulate Lt. Columbo: "I may be a little slow here, maybe it's just me, but..."
9. Take responsibility for the emotional outcome.
10. Don't blame anybody for anything anytime.
11. More value is added through problem definition than through problem answer.
12. Just because the client asks a question doesn't mean that's the right question to answer.
13. Don't be insecure. Say to yourself: Hey, if I don't know the answer, and I'm a pro, then this is a really neat question; lets get into it!
14. Is my tummy telling me something's wrong? My tummy's right. Lets talk about it.

Source: Maister, Green, Galford, The Trusted Advisor, Free Press, 2000.

BROADCASTING TACTICS

(In approximate order of effectiveness)

1. Proprietary Research
(PRODUCING STUDIES, ANALYSES AND FACTS THAT COMPETITORS DO NOT HAVE)
2. Seminars
3. Articles
4. Speeches
5. Attendance At Industry Meetings
6. Websites
(WITH USEFUL CONTENT)
7. Networking
8. Indirect Referral Sources
9. Community Activities
10. Getting Quoted
11. Newsletters
12. Brochures
13. Cold Calls
14. Direct Mail
15. Advertising

Source: Maister, Managing the Professional Service Firm, Free Press, 1993

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ASSESSING MARKETING RESULTS

1. Recurring Business Ratio: What percentage of your revenues will recur next year without any effort?
2. Capacity: What is your total marketing capacity (measured in person-hours)?
3. Win-Loss ratio: What percentage of assignments that you pursue do you win?
4. Assignment Size: What is the size of your average assignment?
5. Penetration Ratio: What percentage of all fees spent by a client on services in your area do they pay to you?
6. Sole Source Ratio: What percent of your business is won on a non-competitive, sole-source basis?
7. New Client Ratio: What percentage of this year's revenues are from clients you had never worked for prior to this year?
8. Client Retention Ratio: What percentage of your top ten clients were top ten clients three, or five, years ago?
9. New Service Ratio: What percentage of your revenues come from services you didn't offer three or five years ago?
10. Marketing Breadth Ratio: What percentage of your senior people have a demonstrated capability of bringing in a volume of business at least triple our average revenue per person?

Source: Maister, True Professionalism, Free Press, 1997

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GET BETTER WORK NOT JUST MORE WORK

WILL THIS ENGAGEMENT....

1. Allow Us To Learn New Skills?
2. Expose Us To An Important New Client?
3. Increase (Not Just Sustain) An Important Existing Client Relationship?
4. Allow Us To Leverage More Than In The Past?
5. Allow Us To Command Higher Fees Than In The Past?
6. Allow Us To Work “Higher” In The Client Organization?
7. Introduce Us To A New Industry?
8. Lead To Better Work With This Client?

IF NOT, WHY DO WE WANT THIS WORK?

Source: David H. Maister, True Professionalism, Free Press, 1997

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PRINCIPLES OF GETTING HIRED

- 1 If there is any one secret of success, it lies in the ability to see things from the other person's angle as well as your own (Henry Ford).
- 2 The only way to influence people is to talk about what they want, and show them how to get it.
- 3 People buy for their reasons: not for yours. Your job is to find out what their reasons are.
- 4 The key talent is being good at getting the client to tell you his/her problems, needs, wants and concerns.
- 5 If they're talking you're ahead: if you're talking you're losing.
- 6 Don't talk too much. Ask good questions and listen.
- 7 If you say it, they can doubt you: if they say it, it's true.
- 8 More buying decisions are based on impressions and perceptions than on reason. Never forget the role of symbolism in creating impressions and perceptions.
- 9 People hate to be sold, but they love to buy.
- 10 You'll have more fun and success when you stop trying to get what you want, and start helping other people get what they want.
- 11 Getting hired takes time: focus your efforts on fewer prospects and devote more time to each.
- 12 Treat all prospects as if they were already clients.
- 13 The vast majority of professional projects are awarded at the pre-proposal stage: the formal proposal and/or presentation merely confirm (or destroy) a decision already made. If you can't afford to spend time, in contact, up-front, don't bother writing the proposal.
- 14 Information collection is key to success: what do you need to know in order to understand the situation?
- 15 What can you learn about their business in advance? - get it!
16. Focus on the person, not the role.
17. Begin by emphasizing and keep on emphasizing- the things on which you agree. Persuasion fails when you try to rush and omit steps in the logical progression of your argument.

PRACTICE DEVELOPMENT IDEAS – BIG AND SMALL

1. Treat all prospects like clients
2. ...and your best clients like prospects
3. Ask “Who in this Company wants change?”
4. Illustrate, don’t assert
5. You Can Never Over-research a prospect
6. Give proof that you are customizing to his/her situation
7. Give a favor to get a favor
8. Ask about successes first: Then about concerns
9. Ask “How are you doing it now?” Then ask “Why?”
10. Ask “what don’t you have time for?”
11. Turn all your assertions into questions
12. Ask “Would it be of value if ...”
13. Establish the (Quantified) value of project, then..
14. Talk of investment, not fees

PRINCIPLES OF PRACTICE DEVELOPMENT

1. Not all new business is good business: don't fill the factory with junk work.
2. Practice development efforts should be focused less on getting **more** business and more on getting the right kind of business.
3. The most effective type of practice development is at the level of the individual client. "Broadcast" activities (which are needed) should be kept to a limited (small) percentage of the marketing effort.
4. Specific client-level marketing plans should be developed by each senior professional for his/her primary target clients or prospects, together with a specific (non-billable) time budget.
5. Existing clients are the most likely sources of new business and the sources of the most profitable new business. Most firms should spend less time on trying to win new clients and redirect their business development trying to win more business from existing clients.
6. The basis of all practice development is having a better understanding of this client's real needs than the competitors.
7. Most proposals are won or lost at the preproposal stage: clients look at how well you probe for relevant information. If you aren't going to spend time with them up front, don't bother writing the proposal.
8. Most firms should write fewer proposals and spend more time and money on carefully selected target proposals.
9. You know a lot less about your clients than you think you do.
10. Everyone must have a role in practice development, but it's not always the same role: play to individual strengths.
11. The 4 P's of marketing include "Product": service enhancements and new service development are major practice development tools.
12. Cross-selling is hard : integrated services work better.

BEST PRACTICES IN BUSINESS DEVELOPMENT

1. Manage total marketing time as one aggregate time budget, reviewed monthly, so that overall balance between competing activities can be monitored. Don't fragment it among many decision-makers.
2. Require that all staff contribute some time to organized marketing efforts.
3. Establish regularly reported metrics to assess the caliber / quality/ strategic value of new revenues, and not just their volume.
4. Have an organized, regular program of inviting clients in to talk to our people.
5. Establish research department to keep delivery staff informed on a regular basis as to trends, developments and latest news in each client's industry (monthly updates.)
6. Attend every client industry meeting that exists, and have our person write up what they heard, both in formal sessions and at breaks.
7. Train all client contact staff in client counseling skills, how to earn trust and how to deal with difficult situations.
8. Develop (constantly updated) workbook of tips and tactics for how to render greater perceived value at all stages of an assignment.
9. Follow-up with clients on all client feedback that is less than "all top scores."
10. Use results of systematic client feedback in setting bonuses at all levels.
11. Offer an unconditional satisfaction guarantee.
12. Ask satisfied existing clients to give endorsements on video (put on website).
13. Have an organized program for all clients to be visited regularly by senior officers.
14. Inviolable, explicit nonbillable investment budgets established and planned in advance to invest in individual client relationships by doing something for the client (not selling.) Monitor the execution.
15. Systematic program to offer to attend internal client meetings, critique their internal studies, put on free internal seminars for their staff.
16. Establish a program of seconding your staff to work in the clients' organization.
17. Organize a regular program of proprietary research, surveying CIO's and their views and concerns, so you can publish articles, give seminars and speeches with proprietary business (not technical) content. Be THE source of new information and ideas for your clients.
18. Develop screening form to evaluate new client pursuit opportunities. Stick to it.
19. Pursue fewer targets with greater level of effort each.
20. Sales process designed to give value, be generous with ideas and earn trust.
21. Make your website full of content useful to clients (and little else.)

DISCUSSION OF COMMON PRACTICE DEVELOPMENT ACTION STEPS

1. Modify reward system to incent and reward practice development efforts and/or results **(ESSENTIAL STEP)**
2. Work with professionals to help them develop personal strategic plans **(ESSENTIAL)**
3. Install system of personal practice development action plans **(CENTRAL TO ANY EFFORT)**
4. Install system of follow-up and accountability for plans **(ESSENTIAL)**
5. Evaluate current client list for potential new business opportunities, establish specific time budget for best among these **(ESSENTIAL)**
6. Regular reviews of practice development results to assess quality of mix of business **(INCREDIBLY VALUABLE)**
7. Develop “screening” criteria to evaluate new opportunities **(IMPORTANT STEP TO CONTROL QUALITY OF WORK BROUGHT IN)**
8. Mandatory client feedback **(INCREDIBLY POWERFUL)**
9. Design “Listening to Clients” activities
 - One-time research effort **(GOOD FOR SENSITIZING PROFESSIONALS; LIMITED HALF-LIFE)**
 - Ongoing change in operating process **(EXCELLENT WAY OF KEEPING IN TOUCH WITH MARKET NEEDS)**
10. Develop ongoing tracking measures to monitor and evaluate practice development activities **(VISIBLE SCORECARDS AND MONITORING DEVICES ARE VERY MOTIVATING)**
11. Develop list of prospects **(GREAT STEP IF DONE AT INDIVIDUAL OR SMALL GROUP LEVEL)**
12. Review and prioritize list of prospects **(BEST IF DONE BY SOMEONE OUTSIDE THE GROUP TO ACT AS CONSCIENCE)**
13. Develop cross-boundary marketing plans **(ONLY IF FORMAL TEAM ORGANIZED, WITH FOLLOW UP)**
14. Sales skills training program **(GREAT STEP IF PEOPLE WANT TO LEARN. WON'T MAKE THEM WANT TO)**

15. Develop list of, and prioritize, forums for coverage (**USEFUL**)
16. Senior Entry hires to enhance marketability of practice (**SOMETIMES WORTH CONSIDERING**)
17. Poll professionals on attitudes and beliefs regarding practice development (**EARLY STEP. MIGHT BE NEEDED TO GAUGE EXTENT OF CHANGE EFFORT NEEDED**)
18. Provide support personnel dedicated to helping with practice development. (**HELPFUL IF NOT USED AS A COP-OUT**)
19. Develop segmentation scheme of marketplace. Compare and contrast segments (**FOR THE ADVANCED ONLY**)
20. Analyze (Compare and contrast) service offerings (**USEFUL TO KNOW WHERE WE MAKE MONEY**)
21. Develop descriptors of current client base (**MODERATE USEFULNESS, UNLESS PART OF A FULL MARKETING TO EXISTING CLIENTS EFFORT**)
22. Find out what competition is doing
One-time research effort (**NICE, BUT NOT ESSENTIAL**)
On-going change in operating process (**HELPFUL**)
23. Develop comprehensive “Practice Development methodology workbook”. (Only for the largest firms)
24. Market research - “Image study” of client perceptions (**LIMITED USEFULNESS IF AGGREGATED. VALUABLE IF SPECIFIC FEEDBACK IS PRESERVED**)
25. Develop internal database on:
Capabilities around firm and past engagement experiences (**DATABASES ARE A GREAT LAST STEP**)
26. Research and document past success stories to facilitate skills transfer (**NICE IF YOU HAVE THE TIME. WORTH IT IF YOU’VE ALREADY COMMITTED TO A TRAINING PROGRAM. THIS IS AN ESSENTIAL COMPONENT OF A CUSTOMIZED TRAINING PROGRAM**)
27. Estimate size of market(s) (**WASTE OF TIME**)
28. Develop a positioning statement (**COMPLETE WASTE OF TIME**)

EXAMPLES OF “CLIENT AS OTHER” BEHAVIOR

1. Resent client behavior: their ignorance, their failure to accept our ideas, their willingness to let us do things our way
2. Viewing client as competitor for things we want (money, challenge, control), not a partner in getting them
3. Fighting to be right and to prevail
4. Focus on sales not relationships
5. Rehearsing presentations, not discussions

ABOUT DAVID H. MAISTER

(pronounced MAY-ster)

David Maister is widely acknowledged as one of the world's leading authorities on the management of professional service firms. For two decades he has advised firms around the world in a broad spectrum of professions, covering all strategic and managerial issues.

In 2002, he was named as one of the top 40 business thinkers in the world. (BUSINESS MINDS, Prentice Hall/Financial Times)

He is the author of the bestselling books:

MANAGING THE PROFESSIONAL SERVICE FIRM (1993),

TRUE PROFESSIONALISM (1997),

THE TRUSTED ADVISOR (2000),

PRACTICE WHAT YOU PREACH (2001),

FIRST AMONG EQUALS (2002).

His books have been translated into Arabic, Chinese, Danish, Dutch, Estonian, French, Indonesian, Japanese, Korean, Polish, Russian, Serbo-Croatian, Spanish and Turkish.

A native of Great Britain, David holds degrees from the University of Birmingham, the London School of Economics and the Harvard Business School, where he was a professor for seven years.

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