
CLIENT LOYALTY: STRATEGIES FOR BUILDING INNER CIRCLE RELATIONSHIPS

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Client Loyalty is a free, monthly newsletter published by Andrew Sobel, a leading authority on the skills and strategies required to build broad-based, long-term relationships with clients and customers. It is based on Andrew's research, writing, and popular workshops.

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This month: The Porsche and the Client

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THE PORSCHE AND THE CLIENT

In workshops, I'm often asked, "How do you build a relationship with a client who is much older than you are?"

The flip answer is, "The same way you build a relationship with anybody!"

For a more thoughtful answer, keep reading. Oh, the Porsche definitely appears at the end, in case you're wondering about the title.

Often, in fact, professionals in their thirties or forties advise clients who are in their fifties or sixties. It can also happen the other way around (this seems to be happening more and more to me. I don't quite understand it, but it feels inexorable...). In this issue of Client Loyalty, I'm going to focus on the former.

First, let's examine the typical progression in the client's perception that occurs as any relationship develops:

Before you even meet: "You/your firm may be able to help me in some way"

After the first meeting, if it goes well: "I've met you, I like you, and feel you are someone I may be able to trust in a relationship. You appear to possess expertise that will be valuable to me"

As the relationship grows: “The time we spend together is enjoyable and valuable. You deliver on your promises, and add value consistently. We share things in common.”

When you start becoming a client advisor: “You not only have strong expertise and can execute, but you are a good, broad thinker, and I trust your judgment. It’s useful to bounce ideas and situations off you. I’m comfortable talking with you about subjects well beyond the expertise I hired you for in the beginning.”

When you are working with someone who is much older than you are, this basic progression is the same (thus my smart answer at the start!). You may want to emphasize certain things, however. For example:

- **Early on, focus on your specific expertise and experience and on establishing an identifiable area of credibility.** Especially if you’re young, clients won’t accept your judgments or advice on a broader array of topics until you prove yourself in a specific area. In contrast, if you have 25 or 30 years of experience, a client may be more willing to trust your judgment and accept generalizations or principles from you. When I was younger and worked as a strategy consultant with a large firm, I would always try to develop unique data and knowledge around something very specific—e.g., a deep understanding of a part of my client’s organization—perhaps a far-flung division that headquarters understood poorly—or a competitor. This gave me instant credibility and a “platform” that allowed me to be very useful to more experienced executives.
- **Communicate your willingness to invest time to get to know your client and understand him or her.** Not at his expense, but in a way that also adds value. It’s always bad to be presumptuous with new clients, but it’s far worse if you’re 28 and the client is 58. I wouldn’t push this generalization too far, but there is some truth to it: The younger you are, the more a client will insist on your advice deriving specifically from knowledge of her or her organization; the older you are, the more accepting a client may be of advice and suggestions that are based on an extensive body of experience rather than deep knowledge of his particular situation.
- **Connect around universal and personal themes.** When I was 34 and one of the youngest partners in my management consulting firm (The MAC Group, which later became Gemini Consulting, now Cap Gemini Ernst & Young), I started work with a CEO who was in his late 50s. Somehow during our first meeting, I mentioned a story which revolved around calling my father for advice on a very important, personal topic. Suddenly I noticed the CEO wasn’t paying much attention—he seemed to be daydreaming—and I asked him what he was thinking. “Oh,” he said wistfully, “I was just reflecting on your story about consulting with your father on such an important subject. And I was thinking how nice it would be if, when I’m older, my sons would still come to me for advice and counsel.” After that, we clicked right away, despite our significant age difference.
- **Ask especially good questions.** This is always important, but perhaps even more so with a highly experienced, older client. Use good, even provocative questions to tap into your clients’ experience, wisdom, and also biases. Ask about what they’ve tried before, what has worked or not worked, who the major influences have been in their

life, if there is anything they would do differently, if and when they have dramatically changed their mind about an issue—and why, and so on.

- **Understand Baby-Boomer values.** I am loath to stereotype anyone, but extensive research shows that each generation tends to share a distinct set of values and outlooks, shaped by the events of their youth (demographers call these “demographic cohorts.”). Of course you must treat each client as an individual, but some generalizations can be made. Baby Boomers, for example, are highly competitive—after all, they grew up competing with 79 million others for the best schools and jobs. For Boomers, who are mostly in their forties and fifties (born 1946-1963), work is self-fulfillment. They are the “60s” generation at work, and they still want to shake things up and fix them. They aren’t so concerned with leaving a legacy (a key concern of “Traditionalists,” who were born before 1946), but they do want to have standout careers. They are motivated by money, titles, recognition, and the opportunity for self-fulfillment. Making the boss look good is important, since by doing so Boomers enhance their own careers. Remember that despite all the talk about empowerment, Baby Boomers are relatively hierarchical compared to GenXers, the generation born between 1963 and 1983 (more on them in a later newsletter)

On the flip side, you should be aware of the pitfalls in these types of relationships: coming across as arrogant (it’s OK if you’re Peter Ducker and 94), appearing to be learning at the client’s expense, generalizing too much, being overly deferent, showing off how successful you are at a tender young age, and so on.

This last point—showing a little humility, to put it positively—is always good to remember, as the following story illustrates: A colleague of mine, who was 38 at the time, gained a new consulting client who was the owner and CEO of a large, family-run company. The CEO was in his late sixties, and although quite wealthy, he had a very modest lifestyle. For one of the first presentations, my friend drove up to the company headquarters, running late, in his Porsche 911 4x4 special edition. The company parking lot could be clearly seen from the conference room where the client was waiting, and as my friend rocketed up the drive, the rumbling exhaust of his car made such a racket that the CEO and his associates all crowded around the window to see what on earth was happening. They looked on, with heavy, disapproving glances, as my friend slammed on his brakes, turned off the engine, and exited his silver sports car. This did not become, needless to say, a client for life.

To summarize:

- Early on, establish an identifiable area of expertise/credibility
- Communicate your willingness to invest time to get to know your client
- Connect around universal and personal themes
- Ask especially good questions.
- Understand Baby-Boomer values
- Avoid arrogance, generalizations, sycophancy, showing off, etc.

You can, indeed, build wonderful relationships with clients who are older than you. Just be especially thoughtful as you go along.

In a subsequent newsletter we'll look at developing relationships with clients who are much *younger* than you are!

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