

Getting Comfortable with Getting Personal

I recently met with a client of mine, a managing partner at a large professional firm, to discuss an upcoming workshop with a group of his partners. “Please don’t tell them that they have to become best friends with their clients!” he told me, adding, “It’ll terrify them and they will tune out right then and there.” Lurking behind his comment is a common fear about getting “too personal” with clients. Many highly trained professionals, I have found, are fearful about how and when—if ever—to shift the conversation to more personal issues. We’re all quite comfortable discussing market trends or an interesting piece of analysis that we just completed, but turn the subject to the personal realm and things become a bit scary.

No one has to become best friends—or even friends—with clients. But as I’ve pointed out before, to be an effective advisor you have to understand your clients as people. If you haven’t built personal trust and don’t understand their aspirations, goals, and personal values, it will be hard to offer effective, tailored advice.

Here are some basic principles, and a list of questions, that will help you get to know your clients as people—hopefully without either of you getting uncomfortable.

Basic principles about getting to know your clients as people

Follow your client’s lead. Some clients are actually uncomfortable working with you if they haven’t gotten to know you socially and personally, whereas others prefer to stay quite aloof. If a client repeatedly turns down lunch invitations, or quickly changes the subject when you ask about family, he or she is trying to tell you something!

Get in the habit of starting meetings with meaningful small talk. It can be as simple as “How was your weekend?” on a Monday, or “Are you taking a summer holiday?” in June. Some clients love small talk, while others want to get right down to business. No one, however, walks into a client’s office, hurls a PowerPoint deck on the table, and launches directly into a presentation. Even the driest client needs a warm up. Use this small talk to learn more about your client.

Hold some meetings out of the office. It’s much easier to swap stories about teenagers growing up when you’re in a coffee shop or restaurant. Also, try to occasionally have a one-on-one with your client

Take a genuine interest in other people. When you do, the rest is easy, because your questions and interest are sincere and spontaneous.

Don’t be afraid to make periodic forays into the personal side of things. Sometimes all it takes is one good question—which you are probably nervous about asking—to get someone to really open up. Take a risk every so often.

Cultivate your own interests. If you work 100 hours a week, have no hobbies, and never read books, you’re going to be a rather limited conversationalist!

Start early in the relationship. Your first engagement may involve a few weeks or months of very intensive work together, which is an excellent time to get to know each other on a more personal level. Don't miss this opportunity. A few months later, when things have wound down, you may find yourself struggling to create opportunities for face time with your client.

Try to be relaxed and self-confident when you broach personal issues. If you are wound up and tense, your client will notice and be less relaxed herself. Use a casual tone of voice, look the other person in the eye, and smile or look curious.

Some questions that can help

During initial meetings with a new client:

So how long have you worked for XYZ?

Can you tell me something about your career?

What's different about the organization today compared to when you joined?

I'm curious, what do you like most about working here?

I'm curious, what attracted you to the organization?

Where do you live?

So what was the occasion? (pointing to a photograph of your client and a well-known politician, rock star, etc., that's on his desk.)

Is that your family? (pointing to an obvious photograph of your client's family)

Are you an avid ____? (fisherman/cycler/golfer/etc) (again, pointing to a photograph or award)

I saw that you went to Dartmouth...my nephew is a freshman there this year. How was your experience?

I understand that you spent time in Europe/China/Norway/etc in your last job. How was that experience?

Two things will help you out during these early meetings. First, be observant about a client's office. Most people's offices reflect their interests and personal life as much as their job title, and you should use these cues. Second, do your homework. Using the Internet, it's not that difficult to find out a lot about an executive you may be meeting with, particularly if he or she is relatively senior. On the basis of this research you can then formulate some thoughtful questions.

Self-disclosure is also effective in these early meetings. Any number of comments can get the ball rolling and stimulate a good discussion—for example:

“I just came from dropping my daughter off at college in Maine...Do you have any college age kids?”

“It took an hour to get through airport security this morning...So what's your own travel schedule like?”

“Have you heard of a book called “Chasing Daylight?” Another client of mine recommended it to me and I was really bowled over by it...”

...And so on.

Here are some other questions that are useful after you've started working with a client or know him or her a bit better:

You've had such a successful career...what are your fondest dreams now? Is there anything else you would like to achieve?

If you think about how you spend your time at work, what things do you wish you could do more of or spend more time on? Are there some activities you wish you could reduce or eliminate?

What's the most enjoyable part of your job?

Where do you want to go in the organization from here?

Can you tell me about where you grew up?

I'm curious—who has been a mentor or role model for you?

Do you have brothers or sisters?

So did anyone else in your family go into business?

When you look back on the different positions you've held/jobs you've had, what's been your most memorable one?

Is there something you've always wanted to do—a sport, hobby, trip—that you've just never gotten around to?

What's the best vacation you've ever taken?

If you hadn't gone into (business, law, accounting, engineering, etc.) what do you think you would have done?

Most professionals err on the side of not getting to know their clients well enough. Personally, I don't want to make anyone uncomfortable, and I rarely rush in, as it were. But my personal questions—and the sharing of my own personal experiences—have never been greeted with anything but interest and enjoyment. It's an old but true maxim that we love to talk about ourselves. We also tend to like individuals who like us and who are genuinely *interested* in us as people.

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