

# How to be a client magnet

What's the key to being the 'Go-To' professional who every client wants to give their work to? The Results Consultancy's **Steven Pearce** and **John Timperley** offer some tips

**Among the multitude of accountants across the world, there are those individuals who stand out from the crowd. These are the 'Go-To' professionals, the ones who are highly attractive in their field to clients and work referrers. Despite economic turbulence, people opt for them over others in their peer group or specialism.**

So what is it that makes these individuals so special? Are they just born that way, or is there a careful strategy that can be learned and emulated? We decided to conduct research to uncover the answers.

The resulting report, *Becoming The Go-To Professional*, has just been published. It draws on a series of interviews with senior professionals in the accounting, legal, consulting, real estate and financial services sectors who are recognised as the 'Go-To' professionals in their field. They reflected a range of personality types with differing styles of doing business.

The interviews revealed a number of common denominators – the so-called DNA of a 'Go-To' professional – which had four distinct strands:

- \* Network – the approach 'Go-To' professionals adopt when managing their network
- \* Persona – the professional profile and 'brand' they cultivate for themselves
- \* Practice – the role and specialism they build their career on
- \* Relationships – their attitude to developing relationships with clients, contacts and colleagues.

With the first strand, whether it was their external network of contacts, clients and work referrers, or their internal colleagues, the interviewees all recognised the vital importance of building alliances and trusted relationships with those in a position to exert influence. This was not undertaken

in a self-serving manner – what came through was a genuine desire to help others. 'Go-To' professionals rarely dropped a contact, and continually looked for ways to keep in touch and add value.

As one said: 'I try to help other people with their network. I spend a lot of my networking time asking my contacts whether it would be helpful if I introduced them to, or hooked them up with, particular individuals who I think could be useful to them. It's a

ability to control his or her emotions is critical in maintaining client trust. The capacity to be measured, even in the face of mounting pressure or provocation, is a prized asset, and is just as important when interacting with colleagues as it is with clients.

In addition, being 'nice' appeared to bring better results than being smart, and as a result 'Go-To' professionals carefully managed their contribution to meetings, opting for quality over quantity every time. They placed great

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way of adding value that's not obvious – there's not always an overt cross-selling angle to it – but it is to the distinct benefit of the contact in their particular situation.'

A 'Go-To' professional's network is one that is therefore not left to chance; it is carefully managed; and so too is their professional persona: 'authority', 'presence' and 'gravitas' were the sort of words that interviewees used to describe the top-flight professional. But far from being born with these qualities, most acknowledged that to an extent they were cultivated. Indeed, there does seem to be an element of performance about professional life, and clients expect their key advisers to behave in a certain way. One element of success then is an individual's ability to inhabit that professional persona, day in, day out.

In particular, many interviewees made the point that success comes not just from what you do, but the way you do it. For one thing, a professional's

emphasis on the ability to really listen – not an easy skill to master, but one that helps them spot opportunities and forge relationships more easily.

And when it came to building recognition in their field, many saw the value of giving presentations. As one professional put it: 'I've had many work instructions come off the back of conference speeches. I have never had the same return on articles I have written. If there is one skill that is essential for raising your profile, it is the ability to pull together a talk and deliver it with confidence.'

Moving on to the Practice strand of the 'Go-To' DNA, it is often said that at the top level of professional services, such as accounting, what you know (or your technical area of specialism) is a 'given'. It is the other aspects of professional life that need development. This may be so, but the 'Go-To' professionals interviewed were very aware of the need to position their expertise, and to constantly update



## \*HOW GO-TO ARE YOU?

To help you carve out a niche as a 'Go-To' professional, consider these questions:

- \* How well do you know your own strengths and weaknesses? Are you in a practice area that dovetails with your skill set?
- \* In which area could you justifiably claim to be a 'subject-matter expert'? What do you hope to be able to make that claim for in the future?
- \* If your principal work stream dried up overnight, how easily could you diversify?
- \* When did you last seek an opportunity either to innovate within your practice area, or to demonstrate flexibility?
- \* When did you last seek out a media opportunity or speaking engagement to showcase your area of expertise?
- \* When did you last introduce someone from another practice area to one of your clients?

and re-focus their personal practices.

Being clear about their own strengths and weaknesses, and finding a specialism that fitted, also helped. Many had become subject-matter experts in their field and had gained a media profile. However, they recognised that it's not just what you know, it's how you communicate it that really raises your profile.

The professionals interviewed also had a decidedly entrepreneurial outlook. They often thought beyond the task at hand and showed real strategic and commercial sense. This certainly helped with the Relationships strand of 'Go-To' DNA.

Whether these were relationships within the firm or with outside contacts, 'Go-To' professionals emphasised the need to understand the other person's real agenda. This often required them to read and respond to different personality styles. Many had a service mindset and felt that technical ability was often

incidental to high-value client relationships. They invariably used the phone over email to create a more meaningful dialogue, and also endeavoured to meet contacts in person.

The good news about this research is that these four DNA strands reveal factors and approaches that can definitely be analysed and, to an extent, copied. The interviewees were a goldmine of advice, and shared many practical tips that work for them. The trick for any budding 'Go-To' is to apply these to their own situation and actively work to set themselves apart from the mass of other advisers.

Readers of *Accounting and Business* can obtain a complementary electronic copy of *Becoming The Go-To Professional* by emailing: [results@winning-business.net](mailto:results@winning-business.net)

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