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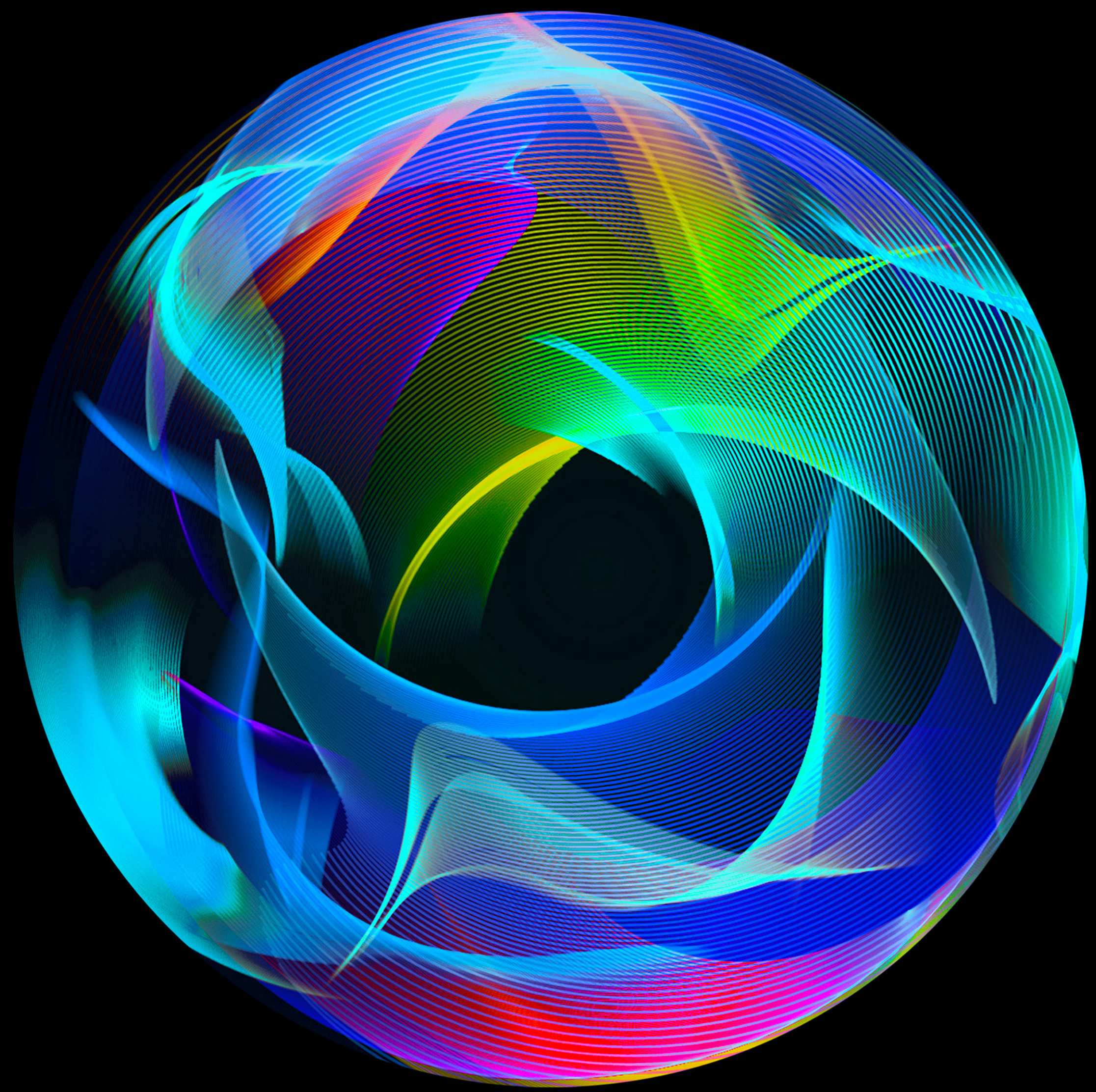


Move on what matters

Tips for deepening your client relationships

Introduction

In order to achieve our 5X25 Strategy we realized we need to connect with our clients on a deeper level. We interviewed several of our leaders and asked them what their clients were going through, and what was keeping them up at night. The reactions we got were both surprising and spot on.

Our leaders talked about how clients were anxious. Struggling to keep pace.
And wondered where they fit in their organizations. And out of that, “Move on what matters” became a rallying cry and our North Star. We made it our goal to create marketing that would make our clients say, “How does Deloitte know how I feel?” We spoke with an empathy that treated our clients as human beings. As people with unique needs that go beyond our services.

We don’t want to stop there: Beyond marketing, we want all our client interactions and engagements to be infused with this same spirit, one that we’ve captured in a new series of videos. Check them out. Explore the key tips. And absorb the wisdom these leaders share. We believe it will transform not only your relationships—but your results.

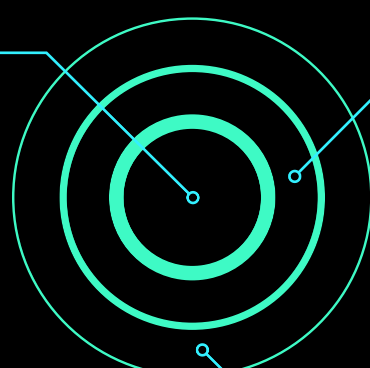
Let’s show our clients that we get them. That they can trust us. And that we are right alongside, helping them fight for what matters most.

Have you made it to the inner circle?
Get to know your clients inside out. Not outside in.

KEVIN WIJAYAWICKRAMA
Principal
Deloitte Risk & Financial Advisory

"We know that if we dig into what matters most—leaving our personal agenda behind—we can empathize, speak their language, and then talk about how we can help."

When I first became a partner, I thought that a successful client relationship was all about me: my ability to convey how the firm can solve a problem, overcome a super tough challenge, or answer the most gnarly questions. But over time, I came to realize that what's important to my clients is the most important thing that matters. So how do you establish a deeper—and better—understanding of your client? **I like to picture three concentric circles: the individual, their relationships, and their organization. And to identify what truly matters to your client, you actually want to start at the center then move outward.**



The individual: Begin with the individual and what matters most at that point in their life. No one will open up to you right away. It requires patience and time to move beyond their resume, build trust, and let them make the choice to let you into their lives.

Their relationships: Next, dig into the personal impact they want to make for their families and their organization. For most of us, what motivates us is very intertwined between work and home life; our clients are no different. So this second ring is all about understanding our client's aspirations, how they're perceived at work, and their goals and responsibilities.

Their organization: While it may be tempting to start with the familiar—like your understanding of their industry—this necessary part of the conversation will be so much more effective after you make sure all the other, and more personal, "gates" are open first.

KEY TAKEAWAY

It's important to get to know your client inside out, not outside in. Similar to what we try to do in life—with our spouses, our relationships, and our friendships. You have to be willing to dig deep, listen, and learn.

RELATED RESOURCES

Business Chemistry
Learn how to improve your relationships by tapping into your clients' Business Chemistry types.

Hopes, Fears, and Legacy lab exercise
Clarify your client's aspirations by reviewing their hopes and fears for the future.

Art of Inquiry
Explore the power of asking effective questions and listening, and how to master conversations to build lasting client relationships.

Is what your client really wants on the agenda?
Making meetings matter

BETSY BESANCENEY
Managing Director
Deloitte Risk & Financial Advisory

"If you think about the past five workdays, how many of your meetings do you remember? How many were truly impactful? And how many were just plain awful?"

Most meetings aren't memorable. We can all probably agree on that. But we could also agree that if we changed that, our clients would take notice; time is their most important commodity. So let's show our clients that we recognize that they have a lot on their plate and at the same time have a number of priorities to tackle in a short period of time.

To create more memorable interactions, lead with empathy and get to the core of your clients' challenges.

1. **Uncover what makes your client tick:** LinkedIn and Google are your best friends to find hints about their personal interests—from volunteering to what boards they sit on—and see if their company has been in the headlines lately.

2. **Give it structure:** To design your time with a client, think of it as three acts. The first part should be focused on ***understanding*** what problem they are really trying to solve, then ***exploring*** the art of the possible. Finally, ***mobilize*** around an action plan for you and the client.

3. **Take the time to understand:** Yes, you bring expertise to the table. But it's equally important to take the time to ask thoughtful questions—about their hopes, fears, and aspirations—before jumping into solutions. And when your client starts talking, make sure you're actively listening and are ready to pivot based on their response.

KEY TAKEAWAY

If we put more time into designing our meetings—and opportunities to engage with our clients—we'll show a respect for their time and will differentiate not only the firm, but prove ourselves to be partners who help them accomplish what matters most.

RELATED RESOURCES

Lab kit
Learn how to incorporate elements of Lab experiences into your workshops, kick-off meetings, and planning sessions.

Relationship kit
Your one-stop-shop to build and strengthen one-to-one relationships.

Five ways to make your virtual meetings more effective
Best practices for running an effective meeting.

Kindness carries no expectations
Suspending self-interest in client relationships

TAMIKA TREMAGLIO
Managing Principal
Deloitte Risk & Financial Advisory

"Showing true, selfless kindness is good not only for the soul, but for building trust and deepening your relationships."

There are endless opportunities for you to help people without any benefit to yourself. Not only does kindness feel good, it helps improve relationships, and it breeds empowerment, inclusivity, and respect.

So why not bring kindness to our teams and clients every day? Here are three guiding principles you can apply to your client relationships:

Suspend self-interest: Completely remove yourself, your motives, and your desires from the situation. Suspending self-interest puts you in a position where you truly approach an issue from the client's point of view and move forward with what is best for them. The best thing you can do is really listen to your client. Taking this approach will transform you from feeling like a used car salesman to a trusted adviser.

Educate, don't sell: Our jobs are not about selling. They're about building client relationships. Are sales important? Yes, absolutely. But at the end of the day what will make you successful is providing the counsel or information that your client truly wants—not what you think they need.

Focus on building real trust: Trust isn't always just based on "clicking" with someone. By showing humanity and building trust with clients, you can help build out a roster of repeat clients. And I like to think about building trust by utilizing the 3 C's: creativity, compassion, and commitment.

KEY TAKEAWAY

Kindness is helping others without the expectation of anything in return—otherwise you are simply just being nice. If you have that generous attitude in your relationships, people recognize it. And they'll act on it.

RELATED RESOURCES

The Business of Kindness
Learn best practices to foster and cultivate compassion in the workplace.

Born This Way Foundation
Explore initiatives to demonstrate the impact of kindness on well-being, emotions, and mental health.

Why kindness in the workplace is essential
Nine ideas for how you can spread kindness among your work family.

Do you trust yourself enough to be vulnerable?
Building stronger relationships with transparency

MICHAEL BONDAR
Principal
Deloitte Risk & Financial Advisory

"Choosing to be vulnerable is akin to taking a leap of faith. You will never have 100% certainty that your vulnerability will undoubtedly resonate... But it has the power to completely transform a connection you have with someone."

When we're working with clients, we're often brought in because we're supposed to have all the answers. But sometimes we don't. And while it feels like a position of weakness, in today's overconfident world, humility can be powerful. In fact, it can actually make your client relationships stronger.

So when is the right time to be transparent with a client if it runs the risk of disappointing them? And how do you know if it's okay to be that vulnerable? Here are a few things to keep in mind to help you act on those moments in a courageous—yet measured—way.

When's the right time? There's no perfect formula or precise recipe to follow. It's largely about trusting your intuition, staying true to your convictions, and using your judgement. But make sure it's the right setting: one-on-one, unhurried without distractions, and at a time when your client can take time to reflect.

Who can you be vulnerable with? It should be someone with whom you feel comfortable. But there are no limitations to role, level, or title of an individual with whom you can be vulnerable. Similarly, you don't have to be at a certain level: Being vulnerable is about being human, and there are no levels or titles required for that.

And what if it doesn't go well? Be prepared for the possibility that what you share won't resonate. Acknowledge the awkwardness that might linger. But don't take it too hard. If your motivations were genuine and sincere; if your honesty came from a place of putting your client's business first; then you have nothing to be ashamed of. Hold your head high.

KEY TAKEAWAY

Whether it's with a colleague or a client, choosing to be vulnerable can help you earn the most important ingredient of a successful professional relationship: trust.

RELATED RESOURCES

Art of empathy
Focus on growing your ability to suspend self-interest and walk in your client's shoes to build trusted client relationships.

Could a little vulnerability be the key to better leadership?
Learn how vulnerability, as a resource in leadership and within the workplace, can change. the game.

The Resilient podcast
Get leaders' candid takes on diving into uncertainty, riding the tides of change—and remaining resilient in the wake of adversity.