Build Relationships with Consultative Client Meetings

Clients want many things, but proactive advice that helps them improve their business is at the top of their lists. Follow the tips below to build strong client relationships through consultative meetings.

Act like a facilitator, not a presenter

1 **Employ active listening.** Learn something new about your client by paraphrasing what you hear. Keep analytical tendencies in check until you have the big picture.

2 **Structure the agenda.** Create an agenda with input from the client. Be open to flexible conversation.

3 **Guide the discussion,** not the solution. Provide options, possible outcomes of each and legal/regulatory implications to help the client make an informed decision.

4 **Create an action plan.** Recap the decisions along with who agreed to do what by when so the client knows the next steps.

Connect With Your Client

1 **Get in their head.** Ask open-ended questions to get the client thinking deeply and to help you understand their issues.

2 **Share examples and stories.** Use unidentifiable examples from your experiences and share client outcomes to show your relevant expertise.

Consultative Meeting Benefits

1 **Stronger client relationships.** A unique experience and proactive advice will build a lasting relationship with your client.

2 **Greater client loyalty.** The insights you share cannot be found easily elsewhere and make you indispensable to your client.

3 **Reduced costs.** Obtaining a new client costs anywhere from three to 30 times more than keeping an existing client. Performing more services for existing clients boosts realization rates.

profitcents®

About ProfitCents by Sageworks
ProfitCents helps thousands of accounting firms and business consultants acquire and retain clients through differentiated, high-value services. Build or strengthen an advisory practice, leverage robust benchmarking data or streamline the audit process.

To learn more or request a product demo, please contact support@profitcents.com or 8333.422.7446 (option 2)