

# Be a fearless promoter

## Never stop looking for ways to give your clients a boost

This column marks the beginning of a five-part series emphasizing how the adviser of the future will delight stakeholders they serve by embracing a perspective of continuous contribution. The characteristics and qualities to be discussed span the entire lifecycle of a business. My hope is to inspire both the owner and advisory community to adopt a different mindset to enable even higher levels of performance.



**MARC ROSEN**

Co-founder at The Client Experience Institute™ and president of The Vector Group, LLC.

Marc consults with a number of privately held businesses and professional service providers. He is passionate about serving others and having them evolve from success to significance. To learn more, visit [www.clientei.com](http://www.clientei.com)

(216) 401-5445  
[mrosen@clientei.com](mailto:mrosen@clientei.com)

In working with numerous businesses and their respective advisory network, it is apparent that higher levels of potential value contribution are often not identified and discussed. This could stem from the business not knowing what is possible to achieve, either individually or across its adviser network. In other cases, the advisory community is waiting to be directed by the client and may not have a clear sense or courage of conviction to recommend a series of value enhancement insights that align with the strategy of the organization.

With this thought in mind, it becomes important to embrace a more proactive approach.

A true client champion is a fearless promoter who makes it a point to possess a deep understanding of the client's business and is keenly aware of what matters most so they can direct their efforts in an efficient as well as effective manner. This type of individual engages in the following types of activities to establish a cadence of continuous contribution:

1. You always challenge yourself to answer this question: How do I make my client's business more successful?
2. You are constantly on the lookout for potential new customers who fit the correct buying profile.

3. You are willing to assist in finding human capital who can contribute to the success of the enterprise. You leverage your extended network and demonstrate a resourcefulness in accessing new talent for consideration.
4. You strive to find opportunities to get the client recognized by nominating them for awards, speaking engagements, serving on a committee, authoring content and sharing recent successes on social media.
5. You stay apprised of pertinent developments of note by engaging in social media, utilizing Google alerts, receiving client newsletters, reviewing client websites and keeping abreast of pertinent industry trends that impact your clientele.
6. You have the ability to access a vetted network of functional experts who for both planned and unplanned circumstances, can be a potential source of support and serve as a voice of reason.
7. You broker introductions to other companies or individuals who have distinctive competencies that your client can learn from.

Adopting this type of client-centric perspective helps to ensure that we keep top of mind additional ways we can contribute to the clients we serve and feel a greater sense of impact, beyond the normal expectations that are part of being a highly competent professional. By getting into the routine of thinking and acting as a client champion, you become more memorable and expand your view of what is possible to achieve. ●