



# PROGRAM PORTFOLIO

# CLIENT EXPERIENCE INSTITUTE

## WE ARE AN ADVISORY FIRM.

Our team is passionate about creating a learning platform where thousands of professionals advance their skills by embracing a **new mindset** anchored in a deep belief that client relationships can and need to be redefined.

In a world of plentiful **human and social connections**, our challenge is not to create more activity — we believe in unleashing deeper impact, purpose, and value.

It's about investing in people who exchange **relationship currency**, accumulate **reputational capital**, and build professional **net worth**.



Share of  
Wallet



Share of  
Mind



Share of  
Heart

CLIENT EXPERIENCE INSTITUTE...  
where smart people come to learn.

## ADVISOR OF THE FUTURE CERTIFICATION

This curriculum provides a certification for embracing the five domains of distinction associated with adopting an advisory mindset, raising your value in the minds of your clients.

Learn how the Advisor of the Future competencies impact performance and relevancy by expanding your communication agility, exercising more intentional cognitive flexibility, and serving in the roles of client champion, value creator and indispensable partner. With a clear understanding of these five competencies, you can confidently transition into the role of advisor of the future.

### WHAT YOU WILL EXPERIENCE

- Understand your individual communications, behavioral style and people reading tendencies
- Discover how the 35 attributes of relevancy contribute to establishing an advisory mindset
- Learn how to think more like a consultant, client champion and value creator
- Apply a client advancement methodology to obtain desired outcomes
- Explore new ways to create value where the client recognizes your contributions
- Establish increasing levels of relationship currency to serve as a catalyst of capital



## A BRAND CALLED YOU

Your image and reputation are essential to establishing your brand in the minds and hearts of clients, colleagues, prospects, and referral sources. Perceptions become the signature statements about how you are viewed as a professional.

### WHAT YOU WILL EXPERIENCE

- Discover ways to maximize the components of BRAND: Believable, Relatable, Authentic, Notable & Distinctive
- Understand the 16 elements associated with Thought Leadership
- Create your Personal Branding statement and action plan



## BEYOND THE TRUSTED ADVISOR

Clients demand a more sophisticated approach from their Trusted Advisors. This program enables you to distinguish yourself at a level of performance that creates distinction in the eyes and hearts of your clients.

### WHAT YOU WILL EXPERIENCE

- Embrace the five levels of relationship capital
- Assess your performance and create an action plan for future growth
- Enhance your leadership presence among the clients you serve and the professionals in your network



## CLIENT SERVICE MODEL

From First Impression  
to Fearless Promoter

Each client interaction is a moment of truth which influences the perception and satisfaction of clients. Creating an enterprise-wide client service model engages the entire spectrum of client interactions that creates greater client loyalty.

### WHAT YOU WILL EXPERIENCE

- Learn about the six distinct stages of the client service model
- Understand how to enhance the client experience
- Create a client service promise and develop a framework for organizational change management

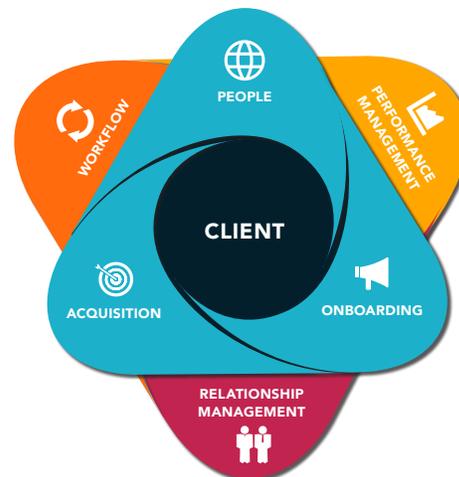
## BUSINESS DEVELOPMENT & BEYOND

The ability to win business and influence relationships are topics consistently discussed and have become the essential skills that successful professionals want to continue to fortify.

This program focuses on a five-step Business Development model that encompasses the essentials of mindful planning, smart discovery, solution alignment, presenting with distinction, and winning the business.

### WHAT YOU WILL EXPERIENCE

- Clarity on who is your ideal client while recognizing the different buying personas
- Understand how to navigate each phase of the buying cycle
- Practice discovery questions that capture business intelligence, insights, and alignment
- Learn how to deliver a powerful presentation through effective storytelling and the anatomy of a lasting impression
- Overcome real or perceived obstacles through adopting an anticipatory mindset



## Everything DiSC® Agile EQ™

This personalized learning experience teaches participants to read the emotional and interpersonal needs of a situation and respond accordingly.

Research studies indicate that developing the emotional intelligence necessary to support a thriving agile culture is essential to an organization's successful future. By combining the personalized insights of DiSC® with active emotional intelligence development, participants discover an agile approach to workplace interactions and learn to navigate outside their comfort zone, empowering them to meet the demands of any situation.

Our program allows participants to discover their DiSC® style, understand their EQ strengths, recognize their EQ potential, and commit to customized strategies for building agility.

### WHAT YOU WILL EXPERIENCE

- Discover the instinctive mindsets that shape participant responses and interactions
- Recognize opportunities to stretch beyond what comes naturally
- Take action to become more agile in approaches to social and emotional situations



## Everything DiSC Workplace®

This comprehensive workplace development program is designed to engage every professional—regardless of title or position—department or function, in building more productive and effective relationships at work.

Participants learn to understand and appreciate the different priorities, preferences, and values each individual brings to the workplace, and how they can learn to adapt to the style of others.

### WHAT YOU WILL EXPERIENCE

- Discover their own DiSC® style: recognize the priorities, motivators, and stress triggers that shape their workplace experience
- Explore other styles: understand the differences and similarities among the DiSC® styles
- Identify strategies to make more meaningful connections with colleagues of various styles and work more effectively to reduce tension, solve problems, and contribute positively to their organizations



## CliftonStrengths

### Leveraging Your Superpowers

When leaders and individuals learn how to consciously seek and invent ways to apply their talents to their goals and tasks, their ability to perform with excellence increases substantially.

Gallup's CliftonStrengths (formerly Clifton StrengthsFinder) workshop enables individuals and teams to understand, apply, and integrate their strengths into their respective roles at work. Gallup's research shows that people who know and use their CliftonStrengths are:

- More engaged at work
- More productive in their roles
- Happier and healthier

Join more than 23 million people who have taken CliftonStrengths around the world.

### WHAT YOU WILL EXPERIENCE

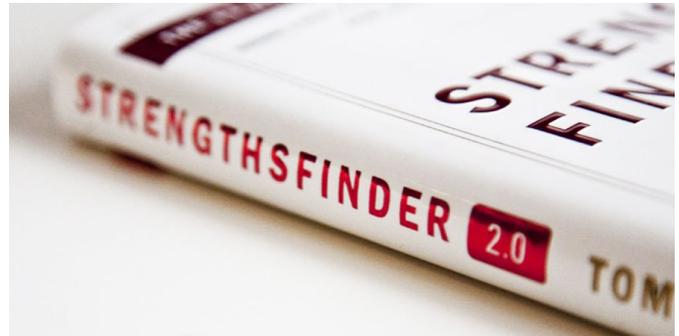
- Review your top 5 strengths based upon the online assessment you complete
- Discover your personal and professional strengths
- Explore the role of strengths in the workplace
- Enhance communication and teamwork

## EMOTIONAL INTELLIGENCE

Researchers and business leaders agree that individuals with high emotional intelligence (E.I.) are frequently seen as more effective and consistently demonstrate stronger overall performance. People with high emotional intelligence are more resilient, flexible, and held in high regard by their superiors, colleagues and clients.

### WHAT YOU WILL EXPERIENCE

- Define and practice self-management, self-awareness, self-regulation, self-motivation, and empathy
- Identify the benefits of emotional intelligence
- Relate emotional intelligence to the workplace



## Everything DiSC® PRODUCTIVE CONFLICT

This program helps participants improve self-awareness around conflict behaviors. Rather than focus on a step-by-step process for conflict resolution, Everything DiSC® Productive Conflict provides participants with techniques to curb destructive behaviors and effectively respond to conflict situations.

The program also features an exploration of behaviors and communications in a conflict context, provides an opportunity for participants to explore their destructive conflict responses, and offers them a method for making more productive choices in their response to conflict.

### WHAT YOU WILL EXPERIENCE

- Appreciate how their style of handling conflict affects the people around them
- Learn how to “catch” themselves when going down a destructive conflict path
- Learn how to reframe a conflict situation and choose more productive behaviors
- Build a common language in the organization around appropriate conflict behavior



## Everything DiSC WORK OF LEADERS®

Discover your DiSC® leadership style and learn a three-step methodology to help you approach the fundamental work of leaders: Vision, Alignment, and Execution. Everything DiSC Work of Leaders® connects to real-world demands, generating powerful conversations, enhances leadership effectiveness, and provides a clear path for action.

### WHAT YOU WILL EXPERIENCE

- Receive an individualized report that highlights your leadership dimensions
- Understand how your tendencies influence your effectiveness in specific leadership situations
- Assess your strengths and weaknesses while identifying steps to becoming more effective when leading others

**CLIENT**    
**EXPERIENCE**  
INSTITUTE

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