

**REPLACING**  
**- THE -**  
**RAINMAKER**

**WORKSHOPS**

**RELATIONSHIPS**

This workbook accompanies the audio workshop. It includes speaker's notes, which summarize the content covered in the workshop. It also includes activities, which you'll complete during the workshop, and a continuing education assignment, which you'll complete after the workshop. The continuing education assignment gives you a chance to apply the theory you learned in a practical setting. At the end, there's a quiz to test what you've learned as well as space to make notes and information on where to go to learn more.

## ***SPEAKER'S NOTES***

### **Learning outcomes**

- You'll learn how to get your prospective clients to like you.
- You'll learn how to get your prospective clients to see you as credible.
- You'll learn how to get your prospective clients to trust you.

### **Build a bond for a lifetime**

- Relationships are pivotal to the success of any client relationship.
- Relationships aren't something you can create with a snap of your fingers.
- You have to invest in your relationships, which takes time and effort.

### **All eyes are on you**

- Relationships are especially important during the sales process.
- Don't be fooled into thinking that you can just talk facts and figures to close a sale.
- You need to develop a personal relationship.

### **Don't skip the small talk**

- We buy the individual, before we buy the company, before we buy the product or service.
- If you want to sign a new client, the first step is to build a relationship with that person.
- You'll struggle to move the sales process along if you skip this crucial first step.

### **Like, credibility, trust**

- To build a relationship with a prospective client, you have to do three things.
- You have to get them to like you, to see you as credible and to trust you.
- Like, trust and credibility are the three keys to building a relationship.

### **The Three C's**

- To get prospective clients to like you, focus on the "Three C's": commonality, caring and connection.
- Show your prospective client that you care about them and that you're invested in their success.
- Seek to understand their situation and empathize with them.

### **Show interest**

- To build a bond with a prospective client you have to ask questions.
- Ask questions to get to know them and to find out what other services they might need.
- Inquire about their personal and professional lives.

### **The Three E's of Questioning**

- The "Three E's of Questioning" helps you uncover relevant information by asking smart questions.
- Start by asking broad open-ended entry question to get the client talking.
- Follow up with elaborative questions to probe for specifics and evaluative questions to judge the priority of an issue.

### **Listen actively**

- Listening actively goes hand in hand with asking smart questions.
- Avoid the temptation to formulate your response while the prospective client is still speaking.
- Keep your ears open and your brain engaged.

## **Relate to their situation**

- It's difficult for people to admit what they don't know.
- Empathize with the prospective client's position and relate the conversation to things that you don't know.
- You'll break down barriers and make it easier for the prospective client to acknowledge their weaknesses.

## **Connect to common interests**

- Over the course of your conversation, draw on common interests.
- It usually won't be hard to find common interests, whether it's sports, arts, hobbies or families.
- Common interests give you a touchstone to ground your relationship.

## **Drop the gobbledegook**

- Speak to your prospective client in a way that anyone can understand.
- As you speak, gauge their reactions to make sure they are following.
- Don't make your client feel unintelligent just to show off how much you know.

## **How to get someone to like you**

- Start your relationship off right by making it clear that you're interested in their entire life.
- If you want them to buy from you, they have to like you.
- No one wants to spend years working with someone they don't like.

## **Establish your credibility**

- The next part of building a relationship is getting your prospective client to see you as credible.
- Use your resume to demonstrate that you have the credentials you need.
- Present other people who are willing to testify to your talents.

## **The letters after your name**

- Your education, degrees and credentials are all part of establishing your credibility.
- Assure prospective clients that you have the credentials you need to do the work.
- Experience and expertise are also part of establishing your credibility.

## **Talents trump credentials**

- Keep in mind that many people will have similar credentials.
- Focus on the credentials that seem important to the prospective client in front of you.
- Talents trump credentials, especially when credentials are universally shared.

## **Bring in a ringer**

- The less you talk about yourself during a prospect meeting, the better.
- Bring in other voices to vouch for your credibility.
- When others vouch for your credibility, they are essentially validating your claims.

## **Live > Film > Print**

- A testimonial is a video or written statement that speaks to what you do best.
- Video testimonials are almost always more powerful than written ones.
- An in-person testimonial is even better than a video testimonial.

## **Be a thought leader**

- Build your credibility by establishing yourself as a thought leader in your field.
- If your fellow accountants value what you have to say, it sends a message to your prospective clients.
- It's an unbeatable way to signal to prospective clients that you know your stuff.

## **Build your brand**

- You can establish yourself as a thought leader by building an active media presence.
- You can also make yourself available as a media source.
- Look for opportunities to speak and present at industry conferences.

## **How to get someone to see you as credible**

- Don't get too long-winded about your accomplishments.
- Remember this is all part of the process of getting to know the prospective client.
- Tell them what they need to know and focus on your unique talents.

## **Put your trust in me**

- While like and credibility can be built quickly, trust takes time.
- Trust is built through deeds, not words.
- Trust is forged in times of crisis, when you go above and beyond to get something done.

## **List your references**

- Get other people to talk about how you've helped them.
- Give the prospective client a sense of what it will be like to work with you.
- They're likely to be reassured if others think so highly of you.

## **Imitate infomercials**

- A demonstration event is a chance to show that you aren't all talk.
- You're showing that you deliver on your promises.
- Make it clear what the prospective client will be missing if they don't choose you.

## **Demonstrate your skills**

- Accounting doesn't always lend itself to demonstration events, but there are options.
- For tax clients, the best demonstration event is to review their prior year's tax return for free.
- Demonstrate that you have a unique perspective and may be a better fit than their prior accountant.

## **Put your best foot forward**

- To build trust you have to be congruent from day 1 of your relationship.
- Do everything you say you're going to do, and do it well and on time.
- Your actions have to match your words throughout the process.

## **Do the little things**

- Send a meeting summary immediately following any interaction.
- The act of sending this email demonstrates follow-through and commitment.
- It's a simple thing to do, but it sets a high bar from day 1.

## **How to get someone to trust you**

- You can't will trust into existence.
- Offer proof, through demonstration events and by following through on your promises.
- Do everything you can to demonstrate your skills and commitment and trust will follow.

## **Reap the benefits**

- Building strong relationships is the lifeblood of any business development process.
- Put in the time necessary to build a relationship with each prospective client.
- It will bear fruits through the sales process and beyond.

## Surviving the rough patches

- You're going to hit rough patches with all your clients.
- If you don't have a relationship with a client, they're going to jump ship when things get rough.
- The clients with whom you've built a strong relationship are the ones who are going to stick around.

## Summary

- Like, credibility and trust are the keys to building relationships.
- Building a relationship is like greasing a wheel.
- It will make the rest of the journey a whole lot easier.

## ACTIVITIES

If you're completing these activities on your own, please write down your answers in your workbook. If you're completing these activities in a group, please write down your answers individually. Then share your responses with up to two other people. Look for commonalities among everyone's responses and discuss any differences.

### Activity 1

Answer the following two questions: What are your most "likeable" characteristics? What ammunition can you use to tout your credibility with prospective clients?

### Activity 2

Outside of the demonstration examples provided in the previous slide, what demonstration events best highlight your value to a prospective client?

## CONTINUING EDUCATION

Practice the art of establishing like, trust and credibility in your conversations with prospective clients. After each meeting, conduct a post-meeting review to identify positives, concerns and areas for improvement in your relationship-building abilities.

## QUIZ

1. Prospective clients are looking for an accountant with whom they have a connection, someone with the necessary skills to do a good job and someone who can be depended upon to perform above expectations.
2. Like, trust and credibility are the cornerstones of relationship building.
3. The three C's for getting someone to like you are camaraderie, compassion and connection.
4. The three E's of questioning are entry, elaborate and evaluate.
5. Admitting that we aren't well prepared for the future and that we don't know things we should is difficult for most of us. Consequently it's important to empathize with a prospective client's position and relate the conversation to things that you don't know.
6. Where you went to school, the degree you earned and the credentials you've earned are all part of establishing your credibility.
7. When others vouch for your credibility, they are essentially validating your claims. This sends a powerful message to a prospective client about the quality of your work.
8. Similar to like and credibility, trust can be built quickly.
9. A demonstration event is a great way to show that you deliver on your promises and to give a prospective client a taste of what it will be like to work with you.
10. The clients with whom you've built a strong relationship are just as likely to jump ship when the going gets tough.

## ***NOTES***

## ***FOR MORE INFORMATION***

For more information about additional workshops, or other Replacing the Rainmaker products and services, please visit [ReplacingTheRainmaker.com](http://ReplacingTheRainmaker.com).