

SHIFTING FROM EXPERT TO ALLY - NEED FOR A NEW MINDSET

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How fulfilling and satisfying is professional practice for you today? How much passion do you have for your work? Does your work energise you, or is it a black hole that saps energy from your soul?

One of the paradoxes of professional practice is that whilst our training equips us well to be technical experts, today's professional business environment requires us to be marketers of services as well.

As Ford Harding points out in Rain Making, professionals who fail to become effective marketers cost themselves and their firms dearly. In his words: "The professional career path is strewn with the bodies of those who meant to get around to marketing someday"ⁱ.

The very thought of becoming a "marketer" often strikes fear deep into the hearts of professionals. The idea of selling our services can be quite an alien concept. Very likely we became professionals with a desire to serve, to use our knowledge and skills to solve problems and to enjoy the respect accorded to us by our clients for doing so. Very few, if any of us, became professionals to become marketers!

SELLING THE INVISIBLE

Although marketing does call for different thinking and different skills, much of the fear disappears when we look more closely at what it is we are really marketing.

What is it that our clients are really buying? We don't have a product that our clients can see, touch or smell. As Harry Beckwith points outⁱⁱ, when we are selling services, we are selling the invisible.

The act of hiring a professional is an act of faith. Think of times in the past when you needed to choose a professional services provider. Now, drawing on that experience, put yourself in the shoes of a prospective client. What are you feeling? Insecure and worried about whether you are choosing the right person? If you do not have enough knowledge to differentiate on the basis of technical expertise, how do you know who to trust? How do you know that your interests will be put first? Who do you like?

Who are you prepared to hand control of your affairs over to? Who are you prepared to share your personal and business needs with?

As a buyer of professional services I must, inevitably, believe a promise. In essence, I am not just buying a service, I am entering into a relationship based on feelings and trust. People mostly use their feelings (heart) to make buying decisions and then use the facts (their head) to support their decision. Understanding this is one of the most important keys to marketing professional services effectively.

TYPES OF RELATIONSHIPS

Whilst developing sophisticated relationship skills is one very important part of the puzzle, knowing what types of relationships to foster is another.

Let us explore this by examining four different types of client relationships described in the model below.

CLIENT RELATIONSHIP LEVELS

Satisfying Organisational Needs	YES	Expert	Ally
	NO	Stranger	Mate
		NO	YES
		Satisfying Personal Needs	

(Adapted from a model developed by Harry A Mills)

Mate - This is an acquaintance or someone you have a social relationship with. More often than not the work is of little value, and risk management can become a real issue.

Stranger - This person is usually officially classified as a client, has a job code and is on the work-in-progress report. Contact is infrequent and remote, and is often triggered by 'pain' such as a crisis. Once the issue is addressed, the remoteness continues.

Expert - This is often the most common type of relationship. This type of client is generally in regular contact and often generates a constant stream of good revenue. Business contact is often reactive in nature and is restricted to your area of expertise for which the client has a high regard. The relationship is technically specific, usually relates to past or current issues and is often a little impersonal.

The relationship can be narrow, paternalistic and reactive. Ego defence and self orientation on the part of the professional are common characteristics, which often lead to mistrust.

As experts we often spend far too little time developing a deep understanding of our clients. So often we tend to jump straight into the content - to find out what the facts and issues are, to apply our analytical skills and immediately start suggesting solutions - "Have I got the solution for you" approach. Clients often perceive this as opportunistic and indifference to them and their situations.

And from our point of view, if we are dealing with the same issues over and over again, monotony and boredom can easily set in. This leads to professional dis-eases of meaning and purpose. The end result can be loss of clients and unfulfilled professional life.

Ally - This is the desired relationship level and is characterised by high levels of rapport and trust. The business exchange is broad in nature and often involves business issues not directly related to your technical expertise. The relationship is more intimate and has a strategic and future oriented emphasis about it. The client demonstrates confidence in your non-technical advice and sees you as a friend and an all round business person. You become a "trusted advisor". The relationship is sustained in the long term and is characterised by both individuals wanting the best outcome for each other. Empathy and genuineness are the hallmarks of an ally relationship.

SHIFTING TO AN ALLY RELATIONSHIP

A shift in paradigm to "ally" effectively transcends the gulf between the person who has the expert knowledge and the person who does not. It puts the emphasis on the relationship between two unique and equal human beings.

There are many things you can do to help develop more Ally relationships with your clients. Whilst covering all of these is beyond the scope of this article, we can explore one of the most critical which involves a shift in perception and thinking from self-orientation to client orientation.

Maister, Green and Galfordⁱⁱⁱ suggest that self-orientation is the greatest source of mistrust. And you can't have an Ally relationship without high levels of mutual trust. In talking about self-orientation, we are talking about far more than direct self interest. We are talking about anything that takes the focus off our client. Have a look at the following list of "threats to client focus" identified by Maister:

1. Selfishness
2. Self-consciousness
3. A need to appear on top of things
4. A desire to look intelligent
5. A to-do list on our mind that is a mile long
6. A desire to jump to the solution
7. A desire to win that exceeds the desire to help the client
8. A desire to be right
9. A desire to be seen as adding value
10. Fears of various kinds: of not knowing, of not having the right answer, of not appearing intelligent, of being rejected.iv

Now be brutally honest and ask yourself which of these "threats" apply to you. Then make a conscious decision to do something about those you have identified. If there are unhelpful behaviours, commit to changing them. If there are fears, explore the underlying beliefs which are driving them and if necessary change those beliefs.

Remember the key to overcoming self-orientation and building ally relationships is to put yourself in your clients' shoes and see the world through their eyes. By making this shift you will be in a far better position to understand and respond to your client's deeper fears, needs and aspirations. Rapport and trust will be enhanced.

CONCLUSION

Developing "ally" relationships is a great marketing strategy. It is good for business. It brings together the environment of the professional advisor and the environment of the client, rather than keeping them separate. It lets the client into "my world" and vice versa. We shift from solving problems FOR clients to solving problems WITH clients.

Ally relationships result in a greater likelihood of recurring work as well as more work from each assignment (ie a growth and profit factor) and a far more rewarding professional experience. There is a change in work experience from a one dimensional solutions driven experience to a multi dimensional experience with the emphasis on satisfying human relationship needs.

In a nutshell — The key to a rewarding professional life, personally and financially, lies in the quality of the relationships we develop with our clients. Ally relationships provide that quality and have the capacity to invigorate rather than drain us. Making the paradigm shift from "expert" to "ally" is a crucial step on the professional services marketing journey.

ⁱ Ford Harding, "Rain Making. The professionals's Guide to Attracting New Clients" (Adams Media Corporation, Holbrook, 1994. P10)

ⁱⁱ Harry Beckwith, "Selling the Invisible. A Field Guide to Modern Marketing" (Texere, New York, 2001)

ⁱⁱⁱ David H Maister, Charles H Green, Robert M Galford, "The Trusted Advisor" (The Free Press, New York 2000, p 80)

^{iv} *ibid*, p 80 - 90.

"If you are selling a service...you are usually selling a relationship. Remember, that often people buy with emotions and justify their decisions with logic!"