

# Strategic Relationships

DEVELOPING  
CLIENT-CENTRIC  
CENTERS OF  
INFLUENCE

As an advisor, every decision you make should start and end with your clients – and that includes choosing which COI relationships you should foster. Of course, it's important to think about the obvious groups (attorneys and CPAs), but the not-so-obvious connections may bring a lot more value to your business. This exercise will help you identify the authentic connections you should tap into.

Determine your ideal clients. You know the ones – the ones that you truly enjoy serving. List their demographics and characteristics below:

- 1.
- 2.
- 3.

Example: Business owners with a busy lifestyle, growing families, or breadwinner women.

How do your ideal clients spend their time? Who do they interact with on a regular basis?

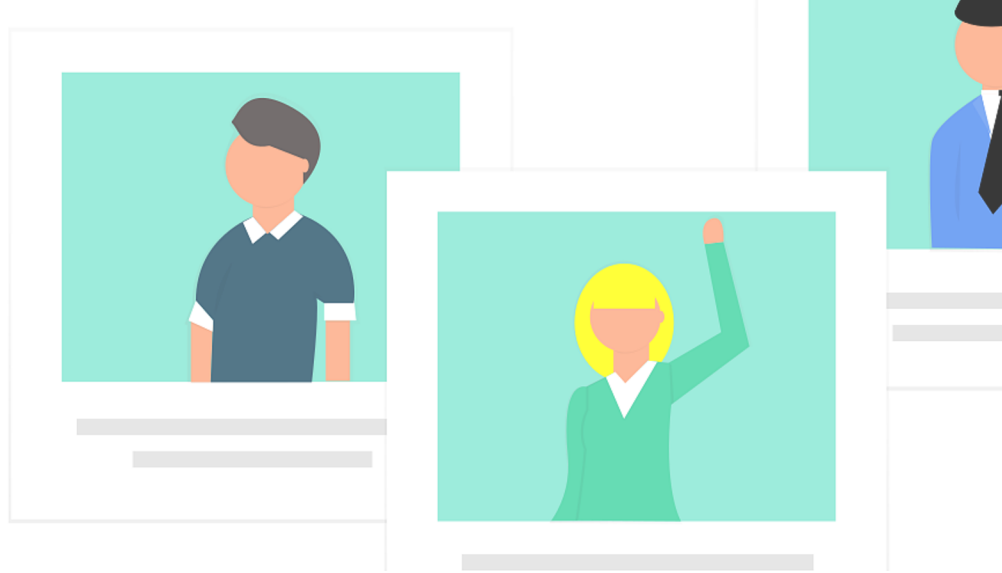
Client 1

Client 2

Client 3

Where do your ideal clients' worlds intersect with each other? Where do their worlds intersect with yours?

Example: All clients have families. Do they belong to a popular, local sports center or theatre group?



## DEVELOPING CLIENT-CENTRIC CENTERS OF INFLUENCE

Reflect on your answers to the previous questions: How can you add value to the networks – or the people within those networks – that intersect? This is the single most important thing you can do – be a resource that creates win-win situations.

Using the example of the sports center from the previous question, how can you contribute to this network? For instance, you might think about becoming the center's treasurer or volunteering to carpool.

Notice: These tasks are natural and often happen in our lives on a regular basis. Train yourself to spot opportunities to get to know your networks on a personal level.

Once you have solidified those personal relationships, what other areas can you help with? Using the sports center example, you could offer to host a Budgeting 101 course for players and tie it back to the cost of the sport in which they participate.

Notice: Serving the center in this way adds value to the parents of the players. You are making your expertise known in a natural way. You've positioned yourself as a resource to these families.

The bottom line is, your personal life is where you build genuine, long-lasting relationships. So, if you're willing to put yourself out there to CPAs and attorneys that you may not know well – if at all – then why not pursue COIs from relationships you cultivate naturally on an everyday basis?