

NAVIGATOR

How Are We Doing?

The next time you meet with a client with advocate potential, ask “How are we doing?” It’s a simple but potent question. It shows that you care about them (which, of course, you do). And, it gives you an opportunity to hear directly how they perceive you’re helping them.

Idea

You’re nearing the end of a bi-annual business review with your client Elaine. Everything is tracking just as you two had planned six months ago. Often, this is part of a conversation that can become more chit-chat than serious. But it’s a perfect opportunity to ask the following:

“Elaine, how are we doing?”

You may consider that your role in this relationship with Elaine is strictly as her advisor. However, her response below shows that, clearly, she sees things differently:

“Gosh, you take complex concepts and communicate them to us in ways we understand without making us feel foolish. We’re always caught up in the day-to-day goings on of running a multi-generational, family-owned business. We know you have our back, so we focus on other things. It gives us a tremendous amount of confidence, and we sleep better as a result.”

Elaine’s response was insightful. She told you exactly how she and perhaps other family members view the help you provide. You’re seen as a provider of confidence. Furthermore, by asking this question, you’ve solidified a feeling of caring, commitment, and engagement with her.

So, what does this have to do with referrals? Understanding how advocates view you helps when you educate them on what it is you want to sell more of and to whom.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.