



# David Maister

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### How Clients Choose

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by David Maister 1991

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The single most important talent in selling professional services is the ability to understand the purchasing process (not the sales process) from a client's perspective. The better a professional can learn to think like a client, the easier it will be to do and say the correct things to get hired.

Fortunately, this is not difficult. Most professionals have themselves been through the process of retaining other professionals: lawyers retain accountants, actuaries hire consultants and public relations counselors, like the rest of us, need tax advice. Every professional can deepen their understanding of what's really going on in the purchase process by drawing on their own experiences as a client.

Professionals traditionally view their practice development task as divided into two stages: marketing (generating the lead) and selling (converting a lead into a sale). From the buyer's perspective, these two stages are experienced as qualification and selection processes.

First, I (the client) try to reduce the large number of possible firms and professionals that might be considered down to the set of those that I judge to be qualified. In this qualification stage, I consider these elements: "Who have you worked for?" "What are your capabilities?" "What depth of personnel do you have?" "How good are your references?"

Except in the most unusual situations, where the problem is so complex and high risk that there is only one viable candidate, even the most thorough due diligence (examination of available facts and references, interviewing of candidates, etc.) usually ends with more than one firm or individual that is technically qualified to handle my problem. Typically, after exhausting my abilities as a client to make technical distinctions, I am still left with a choice of reputable firms with good references, all eminently capable of solving my problem.

This leads to an important conclusion: Unless their skills are truly unique and unmatched by any competitor, professionals are never hired because of their technical capabilities. Excellent capabilities are essential to get you into the final set to be considered, but other qualities get you hired.

Once I have decided which firms I will consider in the final set, my focus of inquiry shifts significantly. I am no longer asking, "Can you do it?" but rather, "Do I want to work with you?" I am no longer interested in the institutional characteristics of your firm; instead, I'm now trying to form a judgment about you. By the fact that you are sitting here talking to me, you can assume that you have successfully marketed your firm. Now the time has come to sell yourself.

### What It Feels Like to Be a Buyer

Buying professional services is rarely a comfortable experience. Among the unpleasant emotions frequently felt are the following:

First, I feel that I'm taking a personal risk. By hiring anyone, I am putting my affairs, or my company's affairs, in the hands of someone else, and I'm giving up some degree of control. This is my area of responsibility, and even though intellectually I may know I need outside expertise, emotionally it is not comfortable to put my affairs in the hands of others. Even if the matter is a relatively routine one, I need to be convinced (beyond protestations of good intentions) that my problem will receive prompt and serious attention.

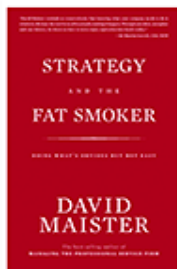
I'm feeling insecure. Since I find it hard to detect which of you is the genius and who is just good, I'm going to have to commit myself without feeling totally confident about my decision. What is more, I don't yet know if I've got a simple problem or a complex one; that's why I need you, the specialist, to help me. But I'm not sure that I can trust you to be honest; after all, it's in your interest to convince me that my problem is complex. Professionals are always making mountains out of molehills. Nothing is ever easy.

I'm skeptical. I've been burned before by these kinds of people. I get a lot of promises. How do I know whose promise I should buy?

I'm concerned that you either can't or won't take the time to understand what makes my situation special. Will you be one of those typical professionals who are hard to get hold of, who are patronizing, who leave the client out of the loop, who befuddle the client with jargon, who don't explain what they're doing or why, who..., who..., who...? In short, will you deal with me in the way that I want to be dealt with?

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To a degree, I am also exposed. Whoever I hire I'm going to have to reveal some proprietary secrets to, not all of which are flattering. I'm also a little threatened. You will be working on things for which I am responsible (marketing consultants are hired by the vice president of marketing, lawyers by the general counsel, actuaries by the benefits manager). By the very fact that you are suggesting improvements or changes, there is the risk that you will uncover things that I haven't been doing right up till now. Are you going to be my ally or my enemy?

What all this reveals is that from among the set of qualified candidates I am looking for the one I can *trust*. The act of hiring a professional is, by very definition, an *act of faith*. I must, inevitably, believe a promise. In selecting a professional I am not just buying a service, I am entering into a relationship. Your selling task is to earn my trust and confidence—with an emphasis on the word “earn.”

### What a Buyer Looks For

How am I to determine with which candidate I want to have a relationship? Certainly the answer is not contained in the promises you make. Talk is cheap. Someone who tells me, “Trust me; we'll show a special interest in you,” is not likely to win my confidence simply by that assertion.

Inevitably, even if I view myself as a sophisticated buyer, I am forced to rely on *clues* obtained through the interview process in order to guess at what kind of person you are. My impressions and perceptions are created by small actions that are meaningful for their symbolism, for what they reveal. How you behave during the interview (or proposal process) will be taken as a proxy for how you will deal with me after I retain you. Unlike the process of qualification, which is predominantly rational, logical and based on facts, the selection stage is mostly intuitive, personal and based on impressions.

The first thing that will catch my attention is your preparation. There is nothing more off-putting than someone who begins the meeting by asking me some basic facts about my company or situation that they could have found out in advance. It not only reveals laziness but it makes me feel like just another “cold call”—you don't have any special interest in me; you're on a fishing expedition, trying to drum up some revenue.

On the other hand, if someone says to me, “I noticed from your annual report that you recently opened a new plant in XXX. What has that meant for your department?” they will catch my attention. It may not be intellectually challenging to read my annual report, but it shows that you do your homework. It tells me something about you.

This point can be taken further because preparation is your opportunity to demonstrate initiative. Why not contact my industry association and gather some information about my company's public data compared to that of my competitors? It will help you ask me more substantive questions and will demonstrate your willingness to *earn* my business. If you want to bring along some printed material, I will be a lot more impressed by something that has clearly been put together for me rather than a preprinted brochure. At least that shows a little thought and consideration.

Professionals who are overeager to impress and thereby spend the whole meeting talking about their accomplishments, what their firm has done and why they are qualified to help me come across as insensitive to me, to my company and to my situation. It sounds like what it is: a standard spiel, reflecting no special interest in me. I do not want to hear about you and your firm—I want to talk about me and my situation. The only way to influence me is to find out what I want and show me how to get it. I hate to be sold, but I may be willing to buy if you can show me that my company and I have some problems to solve or some opportunities to capture.

Getting me to acknowledge that there is an opportunity or a problem won't necessarily be easy because I'm suspicious of your motives. First you must make me feel comfortable, perhaps by asking me what's going well. Give me some new information. Tell me what my competitors are up to. Tell me what you've been doing for other companies like mine. Find a way to be helpful to me.

Give me an education. Tell me about alternate ways that common problems of my industry might be dealt with. Help me understand the advantages and disadvantages of some of the things I have been reading about. Ask me how I am doing things now, and use that as an opportunity to help me understand some options I may have for doing things differently. Tell me something I don't already know. If I walk away from the meeting saying, “That was interesting; I hadn't thought of that,” you've won. I may or may not hire you today, but I'll certainly want to talk to you again. Don't be afraid to float high-risk ideas early on (“just an idea”). Demonstrate your creativity.

I discount all your *assertions* about your expertise until you give me some evidence to back them up. For example, don't tell me about your experience in my industry (or on a particular topic). Instead, illustrate it by asking questions that reveal your knowledge of key industry terminology, facts and figures or latest events. That way I'll draw my own conclusions (which I'm going to do anyway) about how well you understand my business and my issues.

While I want you to know my industry, don't patronize me by trying to tell me what's going on in my business. Instead of saying, “Here are the three most important things happening in your industry,” say, “Our experience suggests that these are the three most important things. Do you agree?” If I agree with you, fine. If I disagree, we can have a conversation.

To avoid coming across as arrogant, patronizing and pompous (a common experiences with professionals) turn your assertions into questions. By doing so, you convert possible signs of assertiveness into evidence that you'll respect my opinions, involve me in the thinking process and be sensitive to the need for a congenial relationship. Your manner of speech—how you choose to phrase your sentences—tells me something about how you deal with clients. Make our meeting a conversation. Don't talk all the time, and similarly, don't grill me.

Show a sympathetic understanding of my role in my company. Understand who I report to, how I'm measured, what my budgets are. By asking me about these things, I'll believe you are treating me as a person, not just a purchasing agent.

This doesn't mean that I want you to wine and dine me or try to win my business by becoming my friend. It does mean that I want you to be sensitive to the fact that your prospective client (me) is a person, not a corporate entity.

Don't start telling me how you can solve my problems until I have acknowledged that there's a problem or an opportunity here. Simply asserting to me that I have problems or opportunities isn't enough. If you say it, I can and will doubt you. If I say it, it's true.

The key talent in good selling is being good at getting me, the client, to reveal my problems, needs, wants and concerns. If I'm talking, telling you about my company and my needs, you're ahead; if you're talking, you're losing. Professionals talk too much. Ask good questions and listen.

As you try to get me talking about my problems, demonstrate your sensitivity. I do not respond well to someone who asks me right up front, "What are your problems?" That's too assertive and you haven't yet earned the right to an answer. Similarly, don't ask, "What's not going well?" I'm not going to answer that. But I might answer, "What don't you have time for?" I can answer that without feeling uncomfortable.

While I am unlikely to tell you my problems, I may be willing to acknowledge problems you already know about. For example, ask me why we do things the way we do, why we haven't tried certain options. Instead of asking, "What problems do you have with that way of doing things?" say, "Some of our other clients who do things the way you do have had to contend with the following issues as a result. What have you done to deal with those consequences?" This question gives you an opportunity to show that you are familiar with my type of situation, and it doesn't confront or challenge me.

If I do begin to show interest in a given issue, your next task is to convince me (or get me to convince myself) that the issue is big enough to bother with. Remember, I don't *like* working with professionals and will only do so when I have to. So I'll only proceed if I'm convinced that the benefit is big enough and certain enough (two separate issues) to justify the expense, discomfort and disruption of using you. Before I want to hear how you'll solve my problem, you need to get me to agree that it's worth solving.

Your most productive tactic is to ask me, "How valuable would it be if...?" and complete the sentence by describing some future state of affairs that you can get me to. Help me picture in my mind the benefits I will receive by reaching that state of affairs. If you get me excited about the possible benefits (not by asserting them, but by getting me to admit that they would be desirable), I will then want to know more about how you can get me there. If I don't acknowledge the benefit, nothing else you say will be of any interest to me.

If I'm still with you, still interested in (maybe) proceeding, I may ask you how you would go about handling my affairs. Don't rush to give me a singular, concrete answer as to "your firm's approach." It may be one that I'm not interested in. For example, maybe I want the "permanent fix"—the version of the assignment that deals with the issue once and for all. Or perhaps I might want the "quick fix"—the version that shows results as soon as possible.

Perhaps I will be more interested in proceeding if your approach will incur minimum disruption to my ongoing operations or will reduce the extent of involvement and effort required by me and my people.

The key is to give me options, help me understand their advantages and disadvantages, and let me choose. If you present me with "your firm's approach," it strikes me as standardized. By educating me regarding alternative ways to proceed, I get value from the discussion. By letting me choose, I am also left with the sense that you're the type of professional who will respect my judgment and involve me.

Recognize that it's unlikely that I'm going to say "yes" or "no" in front of you. I'm going to consult before I make a decision. So don't pressure me. Don't try any "closing techniques" on me. Give me reasons and reasoning I can use when I consult with my superiors and colleagues.

Instead of reaching for a sale at every meeting, make your objective that of making progress in our relationship. Maybe I'll agree to meet one of your specialist partners, consent to provide additional information to you or provide access to one of my other executives. Perhaps I'll participate in one of your seminars or agree to an additional, more focused meeting. Any one of these should be taken as a success. If you try to rush me, I'll take it as a sign that you're more interested in making a sale than in helping me.

I may ask you to submit a proposal, but never forget that because my ultimate decision is based on who I trust, the sale will be made during the face-to-face time we spend together. The vast majority of professional projects are awarded at the preproposal stage. The formal proposal and presentation merely confirm (or destroy) a decision already made. If you can't afford to spend time in up-front contact, don't bother writing the proposal.

Here's what I want if I ask you to make a presentation. Sit down, distribute your materials in advance and we'll go through them together. Don't lower the lights, put up your slides, stand up and walk me through your canned speech. It makes me feel that I'm being lectured to. If I want to ask about something, don't say, "We'll get to that." It makes me feel that you're inflexible.

If I interrupt you, deal with my question. I want to see how you handle yourself when I ask a question, not judge how practiced you are at your standard spiel. Most of you do rehearse your presentations, but you rehearse the wrong things. I'm not looking for how smoothly you can get through your practiced presentation. That's not what will influence my decision. Rather, I give great weight to how flustered you get when I ask hard questions. Flunk that test and I'm not sure you're the one I want to trust. What you should be rehearsing are your responses to my questions.

I want you to prove that you can listen by picking up on my comments, by adapting in real time, by replying to what I've just said. Involve me. Ask what I think. I know that someone's listening to me when they show the ability to depart from their prepared scripts and base their subsequent comments on what I've just said. If you don't have the talent to depart from your script when I throw a curve ball (and I'm going to), then why should I believe in your abilities?

When I challenge you with an objection, hear it out and don't interrupt. Don't tell me I shouldn't be concerned about that: I've just told you that I am concerned. Acknowledge what I've said as a valid concern. I'll let you rephrase and soften it, but make sure you check for my acceptance of your rephrasing. Then give me an answer, and ask me whether I accept your answer. Don't try to "survive the moment" by waffling and moving on. You may get out of an uncomfortable moment, but I'm going to be left with the feeling that you didn't answer my question—and that means I won't trust you.

I'll be impressed if you've clearly anticipated my issues and thought of that objection or concern beforehand—it shows me that you've taken the time to see things from my perspective. So predict my objections and practice your responses as part of your preparation—on such things sales are won or lost.

### **Summary**

There is an old joke about doctors that says they "get fascinated with the disease, but couldn't care less about the patient." Unfortunately, this attitude (and behavior) is all too prevalent in a wide array of professions. Too many professionals get overly focused on technical matters and lose sight of the essential relationship nature of professional transactions. This doesn't mean that technical skill is irrelevant—of course, it is critical. But having technical skills is only a *necessary* condition for success, not a sufficient one.

Above all, what I, the client, am looking for is that rare professional who has both technical skill and a *sincere desire to be helpful*, to work with both me and my problem. The key is empathy—the ability to enter my world and see it through my eyes.

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