Do you want all of your Attorneys, CPAs, Financial Advisors, Consultants, Brokers and Subject Matter Experts to become “Trusted Advisors?”

Build customer and client relationship skills that can last a lifetime!

“The Making of a Trusted Advisor”

A two-day seminar

Engage, Define, Deliver, Renew

This workshop teaches the critical skills, interpersonal actions, methods, and tools required to effectively engage and sustain a trusted advisor relationship with all your clients. Participants will learn the common pitfalls that lead to client dissatisfaction when a professional is perceived as just an “extra pair of hands” or a “subject matter expert”, as opposed to a business trusted advisor. They also will discover the proven approaches to achieving a client relationship built on strong communications, mutual collaboration, business acumen, and trust.

What Makes This Seminar Unique?

Ongoing research conducted by Alexander Consulting and Mark Hordes, on the topic of turning “subject matter experts” of legal, consulting, accounting, software, and business services organizations into trusted advisors has yielded the best practices that leading companies advocate in building long-term relationships with their business clients—relationships that can withstand even the most turbulent of business times. This is the heart of the program. The hands-on design of the workshop combined with its practical techniques enable participants to immediately grasp, buy-in, and apply the core concepts, skills, and processes to a real-time advisory environment. At the conclusion of the session, participants will be able to increase their client effectiveness at the various levels of relationships and engagement, delivering value as an individual contributor or as a member of a professional services team.

Who Should Attend?

Consultants, attorneys, stock brokers, real estate and insurance agents, financial advisors, sales, client business development professionals, customer service representatives, executives and all others responsible for delivering client value and building long-term relationships with clients.
What You Will Learn

• The six most critical elements required to build a trusting relationship with any client
• The four fatal flaws subject matter experts make in client engagements
• The 10 commandments of business advising
• How to effectively implement a trusted advisor relationship
• The four required capabilities of the professional advisor
• How to influence clients with integrity
• The four actions that are required to sustain a relationship with a client
• How to utilize change management interventions in creating a favorable relationship
• How to turn an angry and upset client into a supporter
• How to utilize a proven trusted advisor learning model
• How to really partner with your client
• An effective, “can’t fail” professional approach to engaging clients
• Successful techniques for building trust with client teams
• The norms, values, and rules for a client-trust-focused engagement
• The long-term client relationship model
• Four ways to turn a bad client relationship into a positive experience
• How to develop your personal and professional approach to building the skills you need to become a trusted advisor
• And more…

Becoming the Trusted Advisor

Topics

Unit One: The Trusted Advisor’s Reality
• The Dangerous Trend: Lowered Client Satisfaction and Lowered Firm Profitability and What You Can Do to Turn It Around
• How to Excel in Utilizing Trusted Advisor Skills
• Needs, Wants, and Expectations: Your Clients, Your Firm, and You
• The Four Fatal Flaws and How to Avoid the Major Pitfalls
• The 10 Trusted Advisor Commandments
• Trusted Advisor Assessment: Are You Living the 10 Commandments?
• Advancing from Being the Subject Matter Expert to Being the Trusted Advisor: What’s Required
• Case Study: The Very Unhappy Client—When Trust Is Broken
Unit Two: The Trusted Advisor Process
• Engage: How to Team with the Client to Discover Needs, Wants, and Expectations
• Define: How to Work Together to Establish Clear Roles and Expectations
• Deliver: How the Trusted Advisor Role Is Leveraged to Create Flawless Execution
• Renew: How to Review the Relationship with the Client and Commit to a Long-Term Partnership
• Best Practices and Lessons Learned: Case Examples of Client Relationships in Action

Unit Three: The Four Capabilities
• Expert to Trusted Advisor: Rules of the Road
• Relationship Skills: Emotional Intelligence at Work
• Engagement Management: Moving into Acting like a Partner
• Business Acumen: True Professionalism and Being Seen as a Businessperson
• Personal Assessment: The Trusted Advisor Capabilities Profile

Unit Four: Building Client Relationship Skills
• Influencing with Integrity: What’s Required
• The Four I’s Probing Strategy: Techniques for Focusing on the Things That Are Most Important to Any Client
• How to Facilitate Client and Team Meetings and Be Seen as a Trusted Advisor
• The Power of Communication: Secrets of Verbal and Non-Verbal Communications that Lead to Trust
• Dealing with Client Resistance and Anger: Tools and Techniques to Rebuilding a Relationship Gone Bad
• Role-Play Exercises

Unit Five: Client Engagement and Development Management
• Assigning Professional Accountability while Leading with Collaboration and Heart
• Relationship Models: Trust, Rapport, Communications, and Personal Credibility
• Can You Really Measure Trust? Six Rules for Measuring Trust with Clients
• Leading the Team and Learning Not to Go Native. Danger, Danger, Danger!
• Managing Scope Creep: This Is Not Your Average Ghost Story!

Unit Six: Successful Client Relationship Management
• The Critical Differences: Acceptance, Satisfaction, and Renewal
• Attributes of Valued Client Relationships and Trust
• Identifying Personal Strengths and Challenges
• Personal Trust-Building Action-Planning Management

What Mark’s Clients Say...

Here are just a few of the kind words Mark’s client’s have said about him:

Mark Hordes was tasked with organizing a professional service sales training for participants from 19 countries with a diverging knowledge base. The results were fantastic. Mark was the ideal partner for this S&T service sales training. We will definitely engage him in the future.
--Karl Promberger
Business Unit Manager, Managed Services, S&T Group
The Core Consulting: Becoming a Trusted Advisor Skills workshop provided me with valuable insights into the world of business consulting. I enjoyed your presentation of the concepts and practical examples from your rich consulting experience. You are a great instructor! I liked your combination of reasonably rapid paced teaching and quick hands-on exercises. It helped in maintaining a high level of interest throughout the workshop. Great and worthwhile!

--Pinakin Jaradi
Consulting Manager, Shell USA

Mark Hordes’s insights into the problems that organizations face as they try and move from a product centric to a services centric organization is thought provoking and extremely helpful. My company found their assessment tools very helpful and we will use them as we develop our professional services strategy.

--Donald G. Klenner
Vice President, Fujitsu

As a result of the services training conducted by Mark Hordes, CDI was able to close several professional services consulting engagements worth over $10 million dollars in two months!

--LeRoy Ruggerio
Vice President, CDI

Having people from all of our EMEA offices in the services sales training was a great way of helping sales people network and learn with the interactive exercises. Mark was very knowledgeable and he had a very common sense approach that was easy to follow.

Louis Frenzel
General Manager, EDS

Outstanding! Our CompTIA members gave terrific feedback after your “How to Become a Trusted Advisor” presentation.

--Richard Rysiewicz
Vice President, CompTIA

Excellent! Kept me engaged and showed me different perspectives. Highly recommended!

--Kash Maniar
Managing Principal, Lucent Professional Services

Very, very good Trusted Advisor seminar and topical for our global consultants needs!

--Michael Polelle
Senior Director, QAD

Mark, my group really learned and enjoyed the seminars you conducted for us over the last couple of years. We are working companies that could use your expertise, and I will highly recommend you. Thanks for working with me and raising my skills, it’s been a great asset..

--Tom Birklund
Director Government Solutions Group, Diebold Incorporated

Mark Hordes is an outstanding consultant. I recommend Mark to any firm that wants to raise their business to the highest levels of financial and client success!

--Ken Edelman
President, KEI, Inc.
Interested?

To learn more about Mark’s speaking programs, seminars and consulting services contact:

Mark Hordes

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Your Presenter

Mark Hordes is the founder and CEO of Mark Hordes Management Consultants, a Houston based professional services consultancy and training firm. He is a highly sought after keynote speaker, seminar leader, consultant and advisor to senior corporate executives. Over the past 25 years, he has consulted and led seminars with organizations all over the world and has been profiled in business journals and newspapers and interviewed on radio and television.


His clients have included:

- Qualcomm
- Royal Insurance
- Unilever
- American Express
- Hong Kong Productivity Center
- First Data Resources
- Malaysian Airlines
- S&T Eastern Europe
- Oxford University
- Glaxo Pharmaceuticals
- Computer Design & Integration
- Sage and Ultimate Software
- Hoechst Celanese
- Jefferson Wells International
- 3M
- Datatel
- Pennzoil
- Nestles
- Respirationics
- Johnson Wax
- AGFA
- Renault
- Telelogic
- Exxon
- Fujitsu
- Caterpillar Asia
- Georgia Pacific
- Marathon Oil
- Intel
- EDS
- Volkswagen
- QAD
- Bancomer
- Gambro
- Compaq/HP
- Diebold
- Shell Oil
- Tenneco
- Kronos
- Lucent

Mark attended John Marshall Law School in Chicago IL and graduated from the American Graduate School of International Management (“Thunderbird”). He holds an MBA and MS in Organizational and Human Behavior from Aurora University and undergraduate degree from the University of Houston. His prior experience includes executive positions and strategic consulting with Accenture, Dillingham Associates, PQCI International, Ransford Consulting, Spherion and the American Productivity & Quality Center.

Hordes and his wife, Vivian, an artist, reside in Houston TX.