

How To Become A Trusted Advisor

So you'd like to become a trusted advisor to your clients eh? Who wouldn't but could you do this?

When I first went into sales it was with a Midlands based IT recruitment company. I knew nothing about sales and even less about what it took to create a really strong relationship with my clients - in short I had no notion of how to become a trusted advisor.

Well, the first big lesson I learned, and one I've never forgotten, happened a couple of months into my new job. Let me share the story with you and then the incredibly powerful message I think you can take from it.

Our great rival in those days ran a small, what today would be called boutique, recruitment firm working in much the same geographical area and market sectors as we did. We'll call him Alan.

Alan was a man of his word, entirely dedicated to quality and somebody who oozed traditional values; you know, your average competitor nightmare. As soon as Alan started to trade with a client we found it difficult to get any more work out of them and, equally bad, the best freelancers signed exclusively with him which meant we couldn't use them. All in all Alan was bad news as far as we were concerned.

Then one day it looked like it was all going to change for us. One of Alan's clients was referred to us as being "a really good agency" and phoned in with a tricky requirement he was finding it hard to satisfy. This was fantastic news: at last Alan was failing to deliver which we could use to our benefit with his other clients "Alan couldn't deliver so we were called in" and his pool of freelancers "Alan doesn't have sole control of these clients; we've just put somebody in at so-and-so". Perfect!

The requirement was for an obscure technical skill and only for a very short period of time; 6 weeks I think, but we buried it. Mike, my boss at the time, had me drop all my other more lucrative requirements and work solely on this.

After a few days I'd found two great candidates. Mike took the CVs over personally and arranged interviews there and then. The client liked both and offered one on the spot.

Mike went over in person to see the client to get the paperwork all signed up. When he came back his face didn't convey the triumphant glory that I thought it should have done. In fact he was a regular "Black Ralph". I assumed there'd been a problem but there hadn't - freelancer signed up and client happy. It was something else, something altogether more crushing.

Apparently when the contracts had been signed Mike mentioned that we always appreciate a referral and asked who had made it so that he could thank them in person "Oh sure" replied the client "it was Alan".

How could this be? Who would refer a prized client to their major competitor? It turned out Alan did and he did it for a simple and yet very powerful reason: **because it was the best option for his client.**

Alan felt he couldn't have provided the best candidates for his client because his candidate database was weak in this obscure technical skill so he did what was obvious to him: he referred his client to the people who he felt could do a better job - us!

So, you want to be a trusted advisor eh? Easy: always, that is 100% of the time, do what's best for your clients even if that means you lose out in the short term. This is how you become a trusted advisor and it's almost impossible to compete against: you say "no" when you're not the best option.

Did we get any more business from our delighted new client? Nah, not a dicky-bird. Did Alan? I'll leave you to make an educated guess on that one.