



## BUILDING PROFESSIONAL RELATIONSHIPS

For advisors, it used to be that being technically proficient enough. There was enough work and you could sit in your office and wait for clients to want to engage your services. Times have changed. Competition has increased significantly, and technology is disrupting what clients have traditionally valued.

We see building professional relationships as a skill and discipline that can be learnt and mastered. We work with advisors to build skills, habits and attitudes that result in listening and adapting to client concerns and opportunities, and making offers that address client concerns and that build relationships over time.

We help advisors maximise the contribution that they make to their clients and to generate a deep sense of satisfaction from their work.

Many advisors and professionals are uncomfortable with having to sell, and we offer a refreshing perspective on how to build relationships with clients in a way that aligns to their values, which means they are much more likely to be committed to engaging in these activities.

We believe that building client relationships and generating work happens in conversations with clients, and therefore building the capacity of advisors to prepare for and have these conversations is a direct path to improve the success of their practice.

## We provide:

- A very practical approach that generates results in growing revenue, strengthening client relationships and in improving the engagement and skill of advisors. Mark Raymond has more than 15 years of experience in working with hundreds of advisors.
- A holistic approach that explores key factors and affect human beings in all conversations that we specifically apply to business development. Namely, how to be more proficient in the language we use, how we listen and tune in to client concerns, and the impact of moods and emotions and what to do about them. We provide a precise set of distinctions, skills and a typology of the different types of conversations that happen at different stages of the client relationship cycle so that advisors can participate more effectively in these clients and provide more value to clients.
- An action learning approach that engages people in building skills and habits over time through practice and feedback and accountability. We ensure that any learning outcomes are aligned to the needs of the business and the advisor by setting personal learning and business goals which we review during and at the end of the program.

We provide one-on-one coaching and group learning programs. Our one-on-one programs are customised to the needs of the individual and encompass understanding the individual's goals and ambitions and helping them to get there over time, and to develop the skills, ways of being and habits that will support them to be more effective.

We also run a program called Building Professional Relationships that occurs over a number of months to allow for new habits, skills and attitudes to be embedded.

## Clients



HERBERT  
SMITH  
FREEHILLS

GREENS LIST  
BARRISTERS

Greenwoods  
& Freehills

## Testimonials

*“Having the opportunity to catch up with Mark Raymond regularly is one of the best things about being on the list. While there are no miracle results, working with Mark has led to a much more disciplined, structured and strategic marketing effort. This has produced results. Working with Mark has caused me to take marketing steps that I either did not see or would have deferred.”*

Greens List Barrister

*“Greenwoods & Freehills is a leading Australian tax advisory firm, comprising both lawyers and accountants. Mark Raymond has provided extremely valuable business development coaching to a number of our Directors (partners). As agreed with us, Mark primarily works with our Directors one-on-one to help them sharpen their BD goals and action plans, having regard to the Firm’s overall strategy. Mark also helped us design and facilitate a strategy day involving all Directors, which was highly successful. Mark’s approach is very practical. He is experienced, inspiring and user-friendly.”*

Tony Frost, Managing Director, Greenwoods & Freehills

*“The reason I am a big supporter of Mark is that he drives towards and achieves tangible results with our partners. He develops the skills of the partners and works with them, holding them accountable for action – which inevitably improves their BD results. Mark is now regarded as part of the teams within which he interacts, and has accordingly become an integral component in our business development offering to the partnership. Where sensible, he also works with small groups of partners to coordinate approaches to client opportunities.”*

Paul Bonomy, Chief Marketing Officer, Herbert Smith Freehills

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