



## Who to Who Relationship Profile Sheet

<p>Name, Company &amp; Contact Information</p>	<p>Sam M., Sr. VP, National Bank; Married; 2 children (2nd yr. college and H.S. senior); W. Htfd.; proud of home (remodeling kitchen, landscaper); foodie; loves wine; travels for the food and shopping</p>
<p>Nature of relationships, e.g., customer, prospect, connector, influencer</p>	<p>Sam is a friend and client. Our conversations are business, personal, and career oriented. We meet monthly to just meet and talk.</p>
<p>Strength of relationship rating (1 commodity to 5 trusted partner)</p>	<p>5 Importance, 4 Strength - Sam shares freely, as do I. However, conversation is 80% business topics</p>
<p>Business you've done together – products, services, solutions, referrals, generosity</p>	<p>Workshops, training of his team members. General counsel on career issues and the politics of his organization. Generous with ideas, books, articles, etc.</p>
<p>Why they bought – practical value of solution, risks addressed, anxieties reduced</p>	<p>Per Sam - last two years have been sub-par performances. Need to turn it around in 2015</p> <p>His people need to establish and own their position in the marketplace. They currently pitch deals. Relationships need to become more prominent in their thinking. H2W training will help his team adopt a relationship focused approach</p>
<p>Next steps – opportunities under discussion, changes to relationship strength, changes to selling mode</p>	<p>Opportunity #1 - conduct refresher workshop with Sam's CT team Opportunity #2 - expand training to entire Southern N.E. team serving the middle market client base Opportunity #3 - Work one-on-one with Sam to help him enhance his coaching skills</p> <p>Sam and his wife are foodies. His closest friend Ed (and Ed's wife) are foodies. Ed is also a prospect. Find an exceptional restaurant and have the six of us get together for dinner.</p>



<b>Questions to consider in determining what makes this relationship work</b>	
What are 3 key things you understand about that person?	Sam appears ambitious Sam appears overtly confident With confidantes Sam's insecurities come to the surface  Sam is under a lot of pressure because last two years have been sub-par performances. He needs to turn it around this year.
What, in your view, makes this relationship really work?	Honesty Generosity with ideas to help his team Trustworthy - Sam's confidences to me stay private.
What does this person offer you that makes the relationship important to you (other than revenue)?	I like Sam I learn from Sam regarding relationships, the marketplace, and the escalating degree of competition that is occurring
What do you offer in this relationship that makes it work for the other person? If possible, ask the other person this question.	Creative ideas Little things that help immediately Honest feedback  A solution to increase the team's performance and separate them from competitors