



Managing client relationships

They don't buy you, they buy how
you make them feel

Brady Wilson

A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, wearing a dark jacket with a light-colored fur collar. The woman on the right is seen from the back, looking towards the left. The background is dark and out of focus, with some green foliage visible. The text "Take a few moments to CONNECT with your neighbour" is overlaid in white, bold, sans-serif font on the right side of the image.

**Take a few moments
to CONNECT with
your neighbour**

CPD Process

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Today's speaker



Brady Wilson

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Agenda

The feelings economy

The operating system

How to discover matters most

Energizing your client's brain

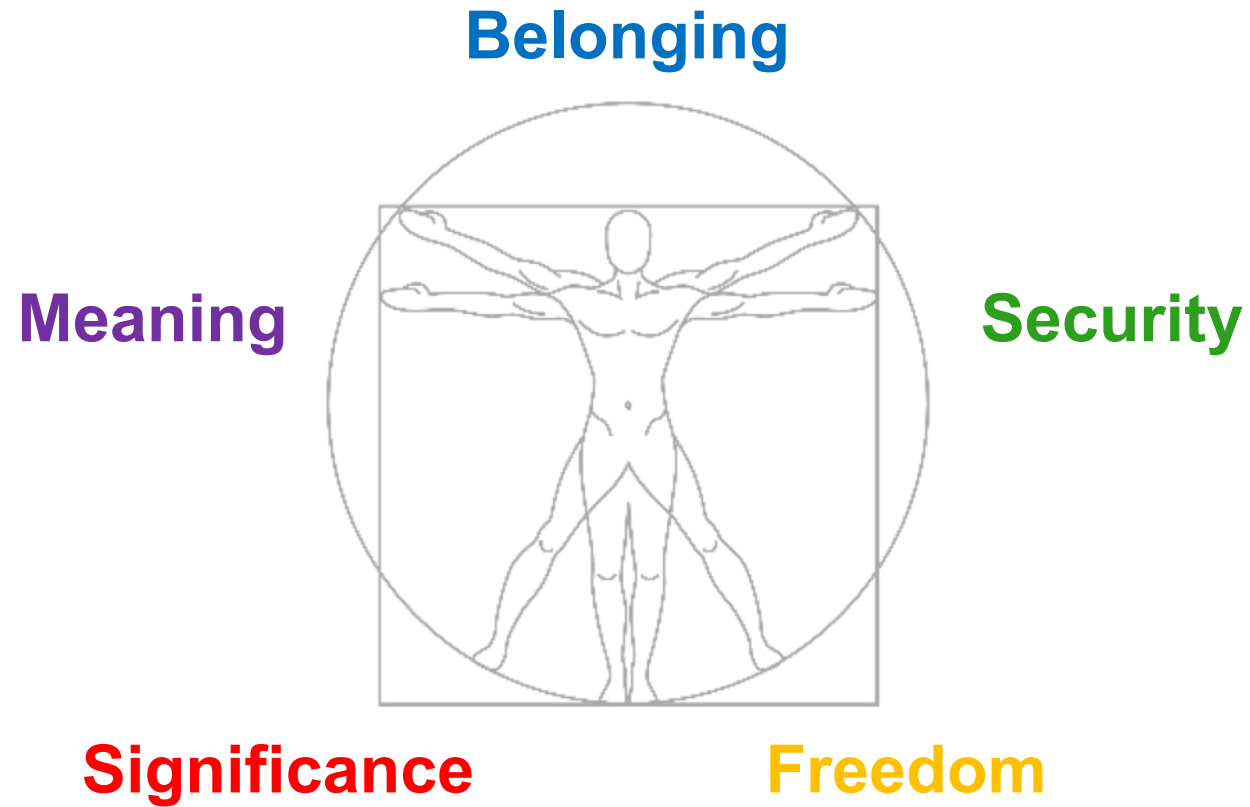
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\$7 Million in 30 Minutes



Your customers have
driving needs
as urgent as oxygen

Five driving needs



Social acceptance



BELONGING

Style



SIGNIFICANCE

Protection



SECURITY

Contribution



MEANING

Escape from the grind



FREEDOM

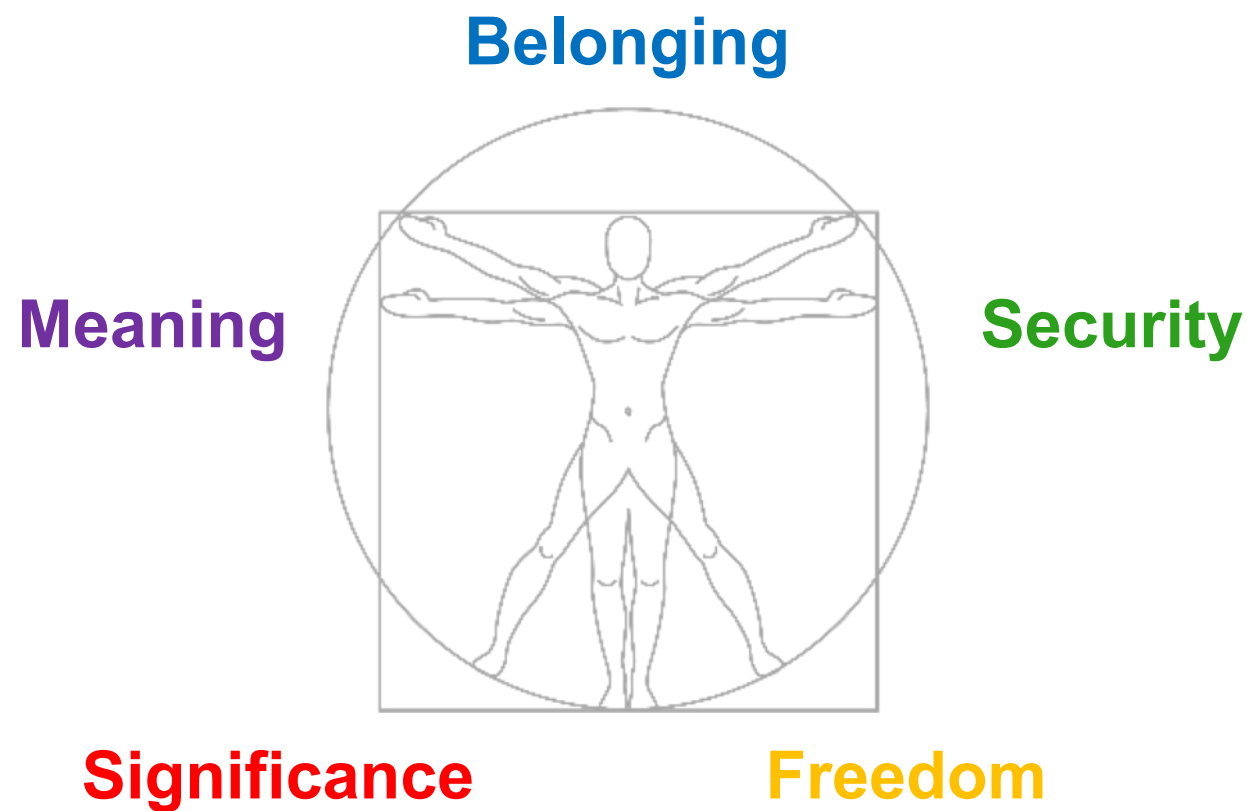
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People make decisions for **emotional reasons**, then justify them with rational ones

“

Every decision you make today will be prompted by your **driving needs**

What matters most to you at work?



Sales operating system

Connect on what matters most

Understand what's possible

Partner for progress

Sales operating system

Connect on what matters most

Understand what's possible

Partner for progress

Connect on **what matters most**



1. Find a partner
2. One of you will tell a 1 minute story about **the best customer experience you've ever had**
3. The other will:
 - Acknowledge what you believe mattered most.
 - Storyteller can verify or clarify
 - Ask, "Why was that important?"
 - Sum up what you've learned about your partner



The currency that is prized by one person can be
meaningless
to another

“

What just happened here?

“

Let's de-mystify the **energized brain**

Create Connection

And you release oxytocin



Oxytocin Unlocks

Trust, rapport, bonding



A lioness is shown in profile, walking through tall, dry grass in a savanna environment. The lioness has a light brown coat and is looking towards the left. The background is a soft-focus landscape of green and brown vegetation.

Trigger Possibility

And you release dopamine



Dopamine Unlocks

Motivation, innovation, goal-orientation

Build Progress

And you release serotonin



Serotonin Unlocks

Agency, belief, confidence



“

How you show up creates **expansion**
or **contraction** in your client's brain

Connection

“I want to work with you”



Possibility

“I see an opportunity here”



Partnering

“I believe we can do this”



Connection x creativity x confidence = multipliers



Operating system

Connect on what matters most

Understand what's possible

Partner for progress



**Connect on what
matters most**

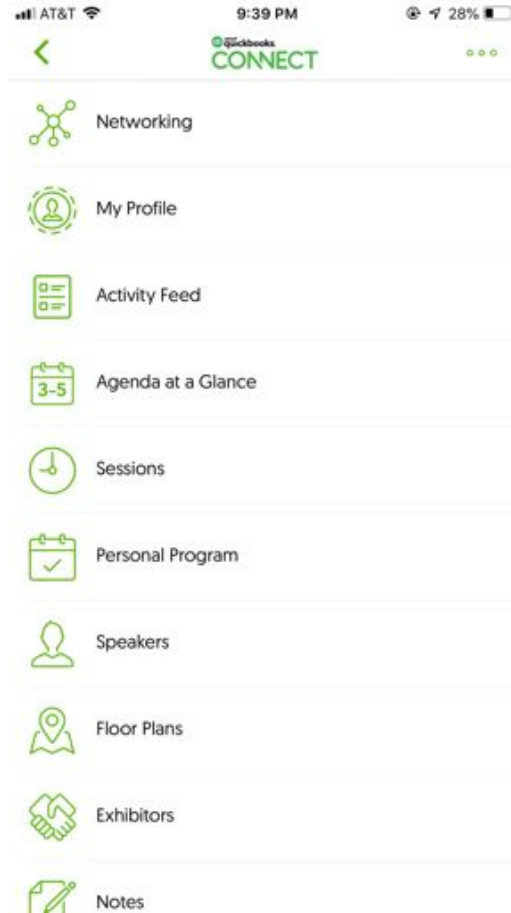
**Understand what's
possible**

Partner for progress

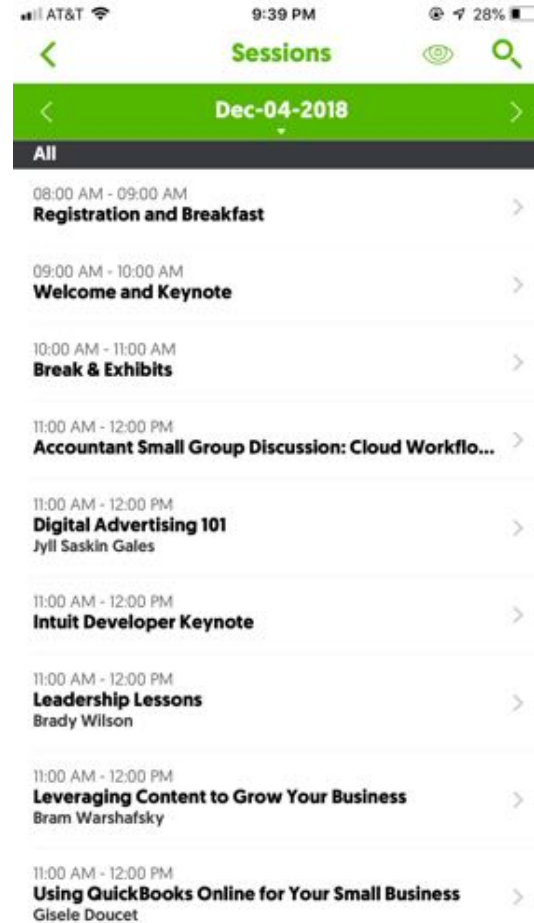
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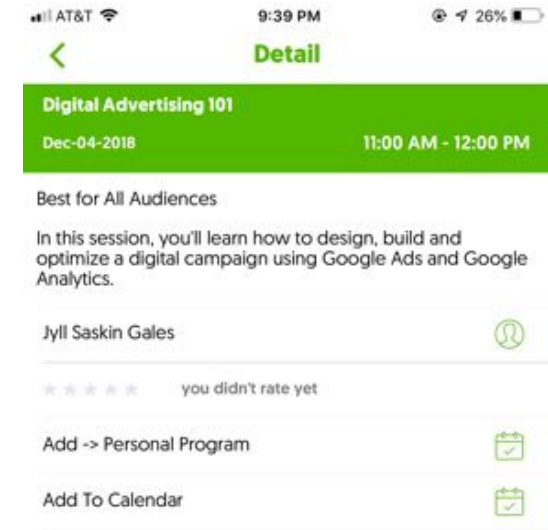
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	Digital Advertising 101	+
	Leveraging Content to Grow Your Business	+
	Leadership Lessons	+
	Using QuickBooks Online for Your Small Business	+
	Warrior Approach to Productivity • session repeats	+
	Accountant Small Group Discussion: Cloud Workflows	+
	Intuit Developer Keynote • session repeats	+



CONNECT

