

9 tips on how to grow your client base

Professional-service firms grow an ideal client when the plan is specific. Nine steps, rewritten for partners who want advisory work rather than more of the same compliance.

Briefing

The original briefing listed nine steps. They still hold. What has changed is the product at the end of them: not “more clients”, but a client base that can take a Non-Executive Director, a sale or investment — and therefore more advisory fees for the firm that introduced the seat.

The nine steps, rewritten

1. Plan on growth. Pick sectors. Tie the plan to measurable outcomes, not activity.
2. Know your market. Review competitors. Differentiate the offer so Category A clients can recognise you.
3. Analyse your clients. Listen, segment, look for cross-selling, and put the whole team on it — not only the rainmaker.
4. Put yourself out there. Network in the rooms your ideal client already uses.
5. Target your marketing. Use the channels that audience actually reads. LinkedIn is one of them.
6. Sell yourself. Clients have more choice. Ask open questions and listen. The next mandate is usually in the answer.
7. Diversify with care. Add complementary services around the clients and sectors you already understand.
8. Open new markets through the existing relationship. Closer working, not lip service.
9. Publish. Regular, plain-English views on live issues. Technical content belongs in the file, not on the page that wins the next meeting.

Where a NED sits in this list

A defined board seat for a growing client is one of the few services that grows the underlying business rather than competing with monthly compliance. Introduce Jayesh. Stay on the thread. Keep the tax and audit.