

WEEK 11

Challenge: Bring Big-Picture Thinking to Your Clients

- ✓ First, read or listen to **Week 11: Be a Brilliant Big-Picture Thinker** in *It Starts with Clients* (pages 173-188 in the hardcover version)

Experts analyze but advisors analyze and *synthesize*—they bring big-picture thinking to their clients. You start by learning about your clients' overarching *goals*. What are they ultimately trying to accomplish? Next, you develop an understanding of the *total picture* or context around the client's business and the challenge of achieving those goals—you climb a tree and take in the view. Finally, you identify the most *critical issues* that may affect the outcomes they seek. These three steps set you up for the next phase of big-picture thinking, which is idea development.

Assignment

Develop New Ideas to Improve Your Client's Business

You may want to review Week 11, starting at the bottom of page 176 of *It Starts with Clients* (hardcover). This section describes the 10 strategies, in the worksheet, in great detail.

Think of a client you are working with or would like to work with. Spend some time thinking about the three foundations for big-picture thinking:

1. What are their overarching priorities or goals right now?
2. What's the total picture for this client look like? What is their current context?
3. What are the most critical issues that are impacting the outcomes your client seeks?

Developing New Ideas for Your Client

Build the foundations for your big-picture thinking by writing down ideas for each of the 10 techniques.

Big-Picture Thinking Technique	What's your idea or next step to use this technique?
Develop simplifying frames	
Use metaphors and analogies	
Incorporate multiple perspectives	
Redefine the terms of the debate	
Look for patterns and commonalities	
Suspend your judgement and even procrastinate	
Connect with your client and really listen	
Pause, concentrate, and reflect	
Bring in frameworks, best practices, and other ideas from other fields/industries	