

A DIFFERENT KIND OF ANNUAL REPORT: GETTING REAL IN 2016

OUR CLIENTS AND COLLEAGUES ARE DOING *GREAT THINGS*

Together, we're kicking conventional business wisdom to the curb and transforming how people work together as a result.



IN 2016, YOU TOOK YOUR PROFESSIONAL AND PERSONAL VICTORIES TO A WHOLE NEW LEVEL



HELP

You shifted your focus from convincing clients to buy from you to simply *helping them* ... to the (paradoxical) tune of millions in new sales.

LISTEN

You slowed down and paid attention. You got to the heart of your clients' issues, and seriously strengthened your bond in the process.

KEEP IT REAL

You weren't afraid to offer a contrarian point of view. Your clients listened to *you* as a result.

(to name a few)

WE LIKE TO THINK WE ENTHUSIASTICALLY AND HUMBLY DID OUR PART



Andrea Howe and Cate Gregory led over 1300 people through 70 total workshop days on *Being a Trusted Advisor, Trust-Based Business Development, and Trust-Based Selling*, thanks to our partnership with Charlie Green and Trusted Advisor Associates. (We love you, Charlie.)



Speaking of ... we celebrated two important anniversaries this year: 10 years in partnership with *Trusted Advisor Associates* and five years since *The Trusted Advisor Fieldbook* hit the streets. Time sure does fly when you're having fun.



Charlie and Andrea released *Trusted Advisor 24x7: The Video Series* —a 29-lesson set that captures the essentials in three-minute bursts. The best part might just be the **bloopers reel**.



We spoke about *How to Deliver Bad News and Build Trust at the Same Time* to an overflow crowd of 1500 at SHRM. It was an audience like no other—moments before Andrea and Gary Jones took the stage, a few spunky attendees started to do the **Cupid Shuffle**. (We can't wait to groove with you again in 2017, Gary.)



We published another 51 free **weekly tips**, and celebrated tip #100. We even **got an award** for the series. A favorite comment from this year's subscriber survey: "They're bite sized and timely—a nice break from most of my other 'incoming'!" <Blushing.>



Oh—and let's not forget the *personal victories* for a few of our team members



Tracey made a major lifestyle shift by eating more "real" foods (she's lost 32 pounds so far)



Baby Chloe made her debut in **Mike** and Erin's world



Kristin and James, parents of toddler Ollie, welcomed Emmie to their crew

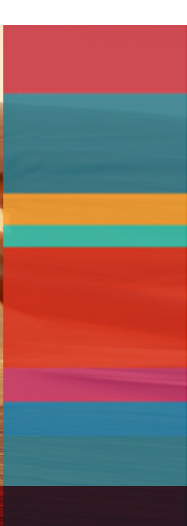


Cate got a new roommate: George, a lively black Lab puppy

BOTTOM LINE: 2016 WAS EXTRAORDINARY

THANK YOU FOR WALKING THE PATH WITH US

WE'RE ALSO REALLY EXCITED ABOUT WHAT'S AHEAD IN THE NEW YEAR



For one thing, we've convinced **Noelle Mykolenko** and **Craig Choffe** to join our delivery team so we can make an even bigger difference in 2017.

Others describe Craig as energetic, funny, passionate ... and Noelle as determined, mindful, and supportive.

We can't wait for you to **get to know them, too**.



What inspires you about the new year?

How will you become an even bigger champion of relationships done right?

What personal victories will you celebrate?

WE CAN'T WAIT TO HEAR *AND TO CONTRIBUTE.*