



Being a Trusted Advisor
February 14, 2014





In this “moment of truth,” what should I do?

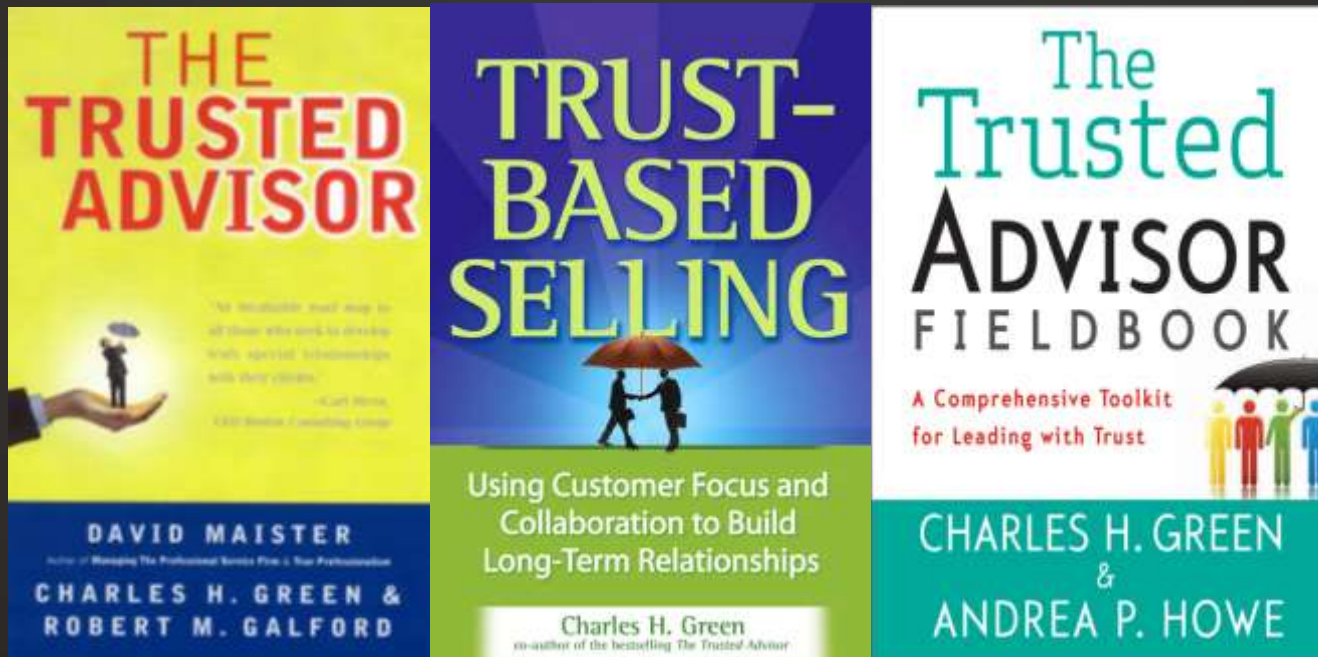
- A. Leave the room
- B. Answer both questions
- C. Share what I learned at school
- D. Redirect attention to the client

Trust is personal

1. Name
2. Role
3. How many months you have been with Audigy/Stratus
4. Why you love what you do
5. An interesting tidbit or factoid that *no one in the room knows about you*



These are our building blocks



What's the “so what” of trust?

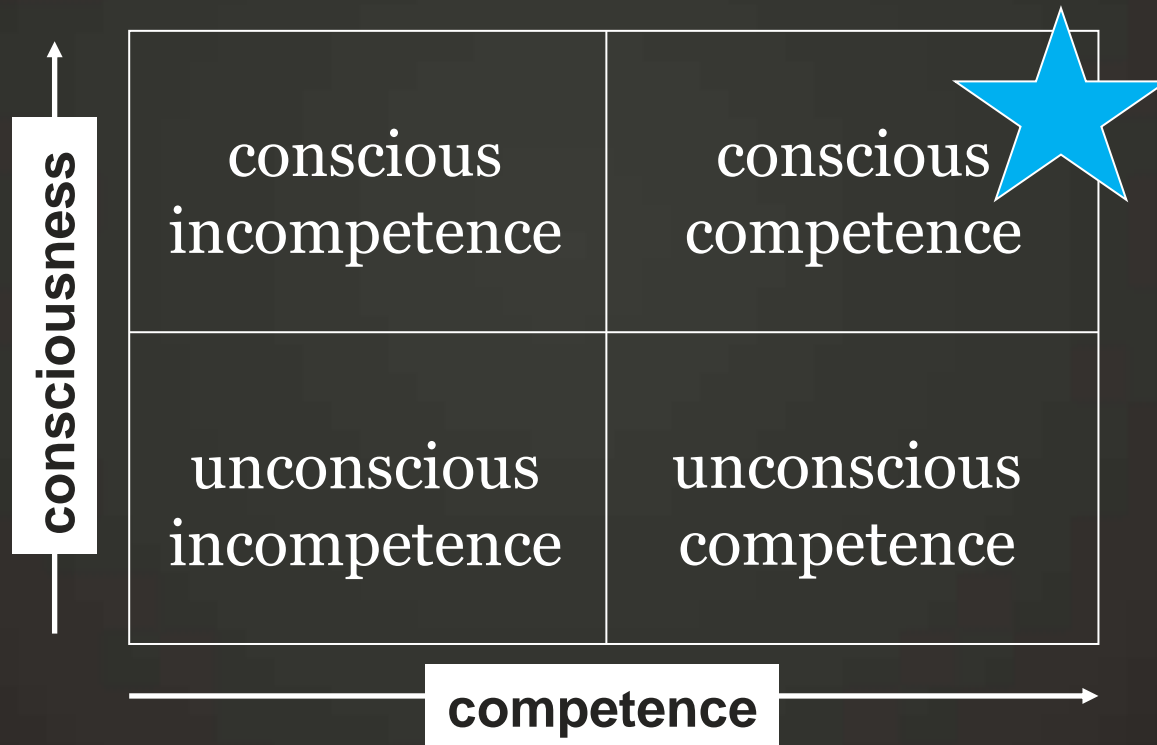
Work = enjoyable

Relationships = rewarding

Results = remarkable

What is the
natural result
when you are
trusted by
your
Members?
Your
colleagues?

Caution: “Mastery” is more than “really good”



We'll be covering a lot of ground

Defining
Trust



Assessing
Trustworthiness



Being More
Influential



Walking
the Talk



Walking the talk: Remember your homework?

Bring to mind your
“stakeholder challenge”:

1. There's misalignment, concern, disagreement, frustration, tension, or conflict (big or little) ...
NOW
2. It's with an individual
3. You can speak about it here



Walking the talk: Say three things out loud

1. “My stakeholder is _____.”
2. “The challenge as I see it is _____.”
3. “My wish/ideal>truest desire for this relationship is _____.”

Building trust starts with being present



Defining Trust



The Trust Principles define four key values

1. A focus on the other **for the other's sake, not just as a means to your own ends**
2. A collaborative approach **to relationships**
3. A medium- to long-term relationship perspective **not short-term transactional focus**
4. A habit of being transparent **in all your dealings**

The 4 Levels of Relationship define your personal value

4.

Safe haven
for tough
issues

3.

Idea-
generator

2.

Problem-
solver

1.

Information-
giver

Walking the talk: How do you see your value?

Thinking about your **stakeholder relationship**, where are you spending most of your time?

1.

Information-giver

Problem-solver

2.

Idea-generator

3.

Safe haven
for tough
issues

4.

Looking up “trust” is a waste of time



The Trust Equation brings clarity to ambiguity

$$T = \frac{C + R + I}{S}$$

T trustworthiness
C credibility
R reliability
I intimacy
S self-orientation

Source: *The Trusted Advisor* by Maister, Green, and Galford, The Free Press, 2000

Reliability is about actions

Actions

Reliability

Dependability

Predictability

I trust him to...

Reliability is the only variable that requires the passage of time

AND you can accelerate it:

- 5. Make lots of small promises
- 6. Be on time
- 7. Use their terminology

Credibility relates to words

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*

Actions

Reliability

Dependability
Predictability

I trust him to...

Here's how to build credibility quickly

1. Show you've done your homework
2. Take a point of view
3. Speak the truth ... always
4. Combine your words with presence

Intimacy relates to safety

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*

Actions

Reliability

Dependability
Predictability

I trust him to...

Safety

Intimacy

Discretion
Empathy
Risk-taking

*I trust her
with...*

Even intimacy can be accelerated

8. Name the elephant

9. Listen with empathy

10. Tell them something you appreciate
about them

11. Address people by name

Self-orientation relates to focus

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*

Actions

Reliability

Dependability
Predictability

I trust him to...

Safety

Intimacy

Discretion
Empathy
Risk-taking

*I trust her
with...*

Focus

Self-Orientation

Motives
Attention

*I trust that he
cares about...*

There are ways to “get off your ‘S’” faster, too

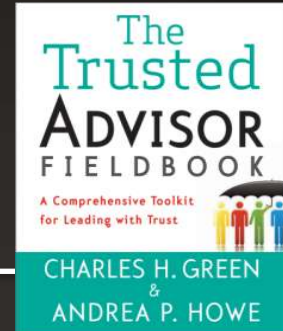
12. Give away ideas

13. Build a shared agenda

14. Steer clear of premature problem-solving

15. Relax your mind

Walking the talk: Your stakeholder's experience



Consider your **stakeholder challenge**. Which variable would he/she say earns your highest score? Lowest score?

$$T = \frac{C + R + I}{S}$$

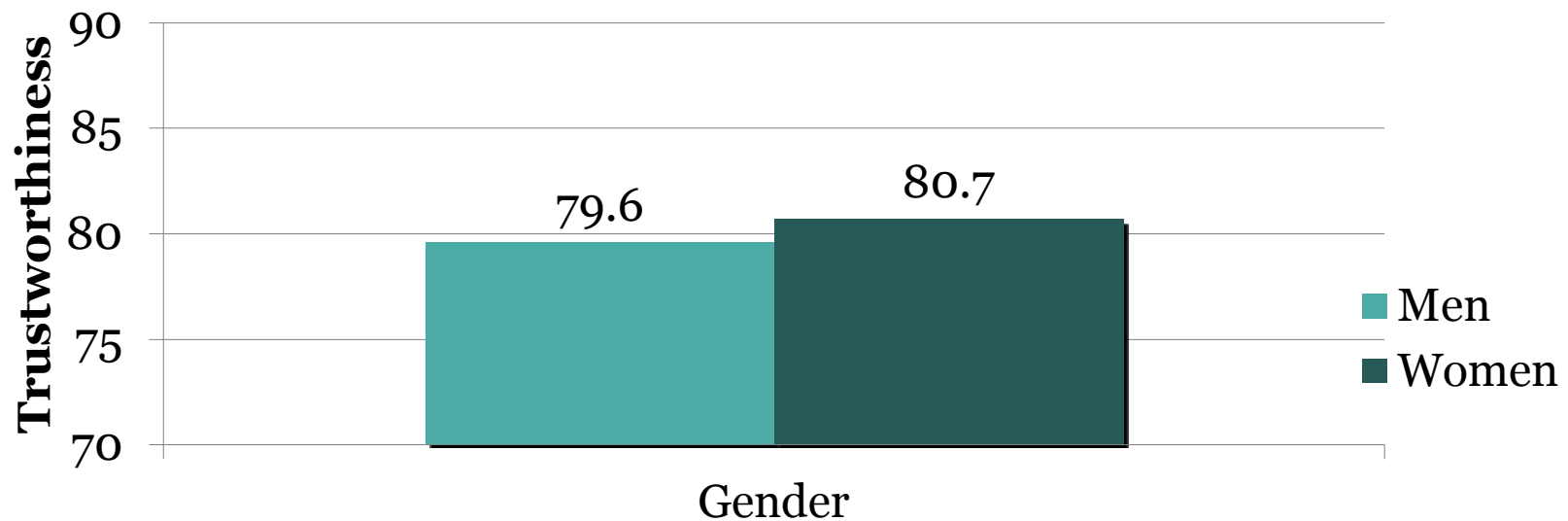
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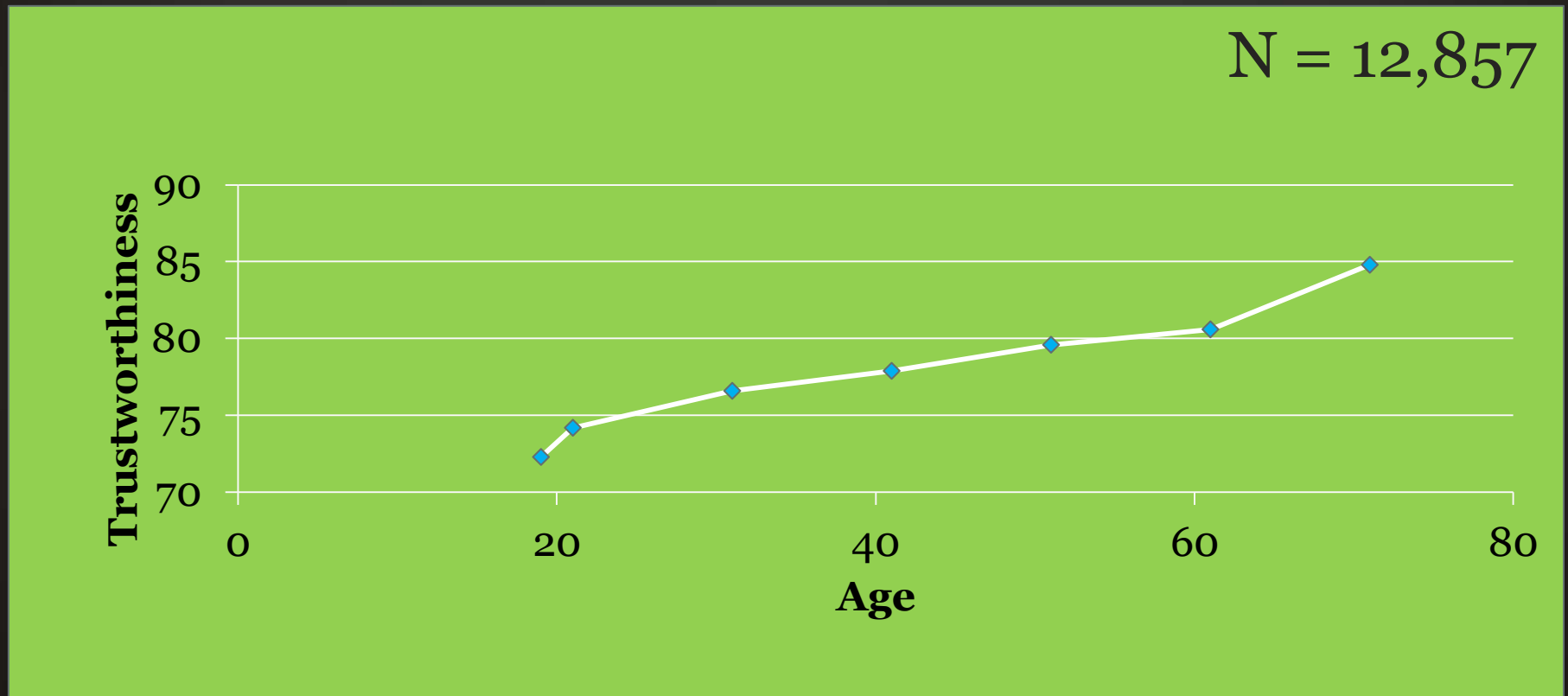
Assessing Trustworthiness

Who's more trustworthy: men or women?

N = 12,857



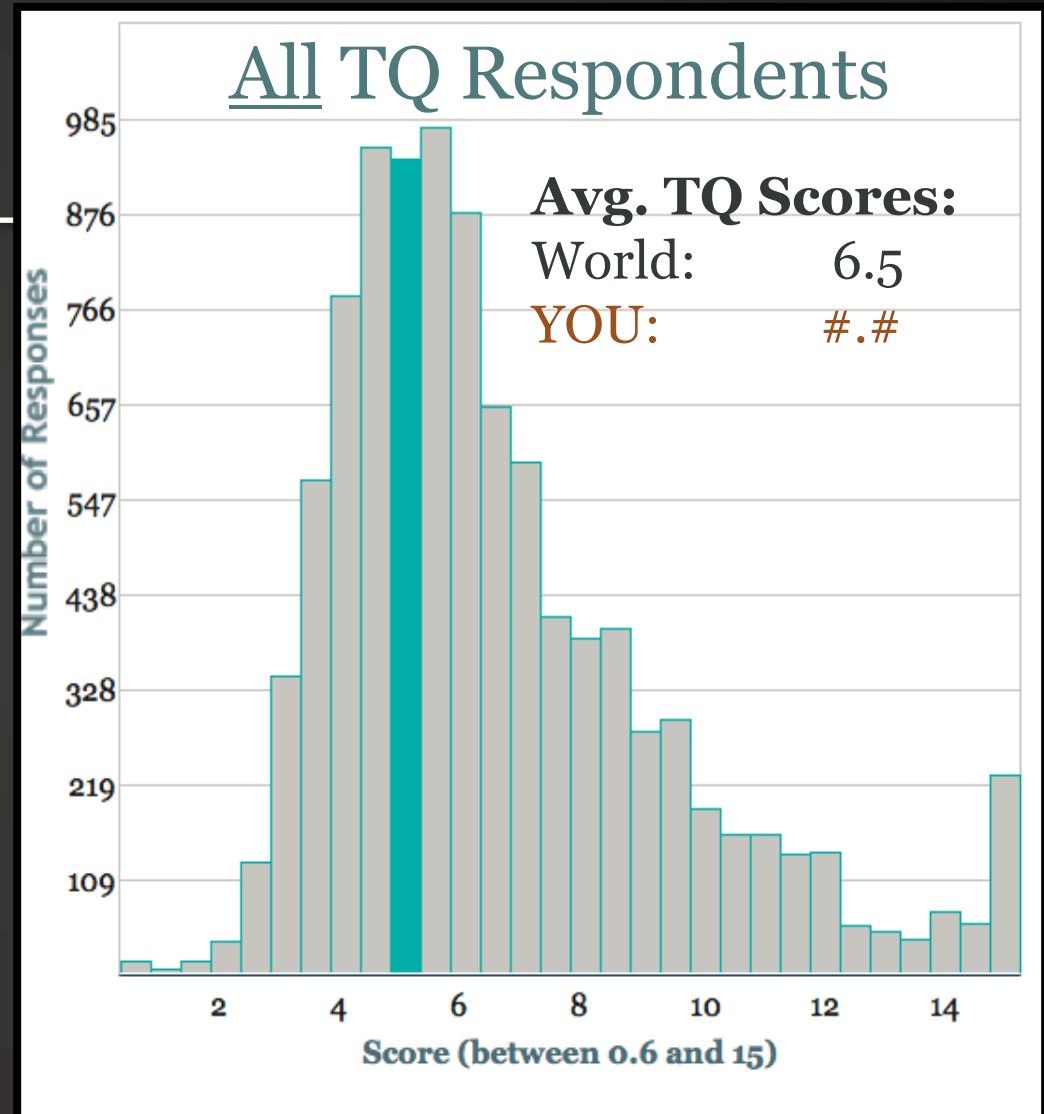
Do we get more or less trustworthy as we age?



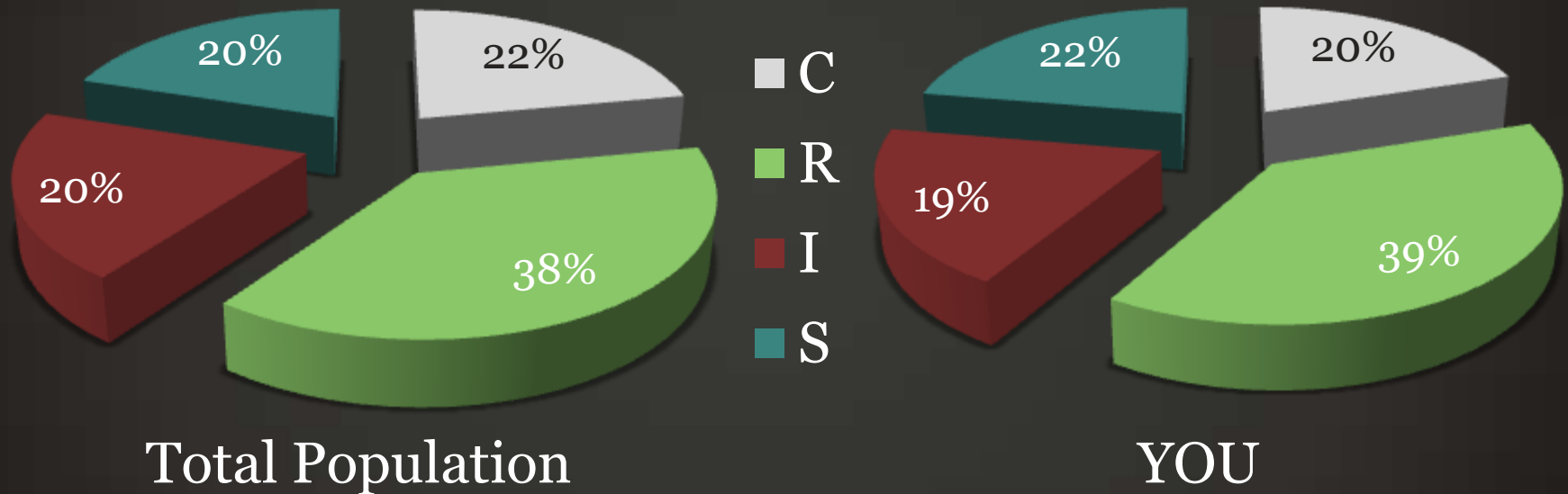
How trustworthy are *you*?

Note: Median skewed left

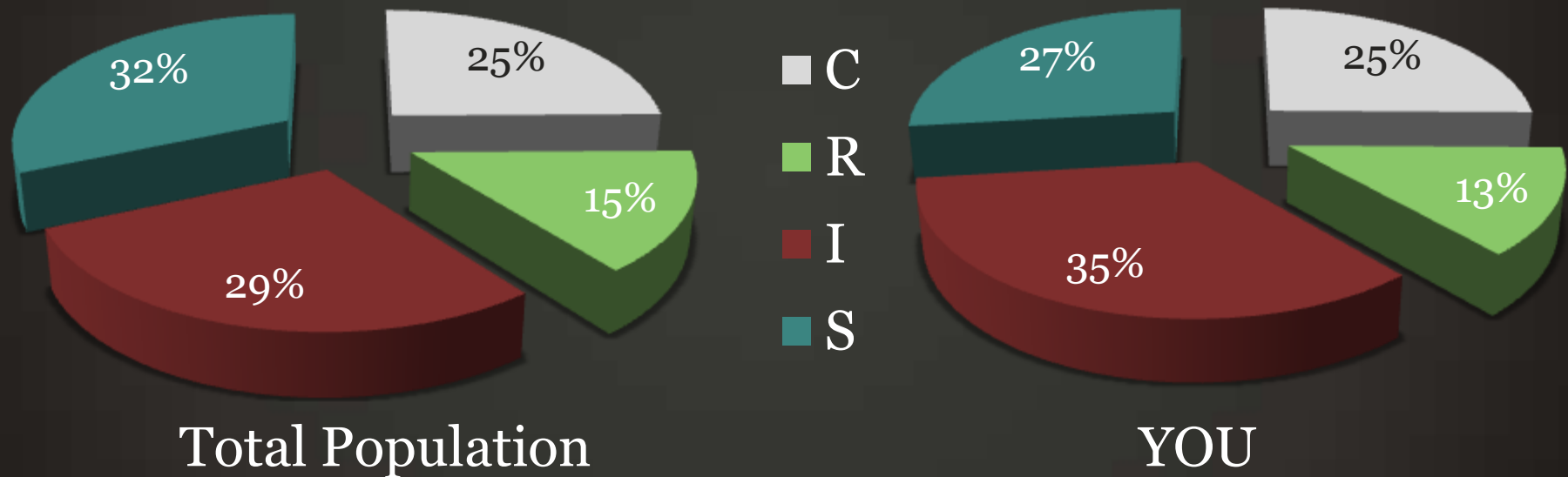
(3 x S)



Here's how you see your strengths



Here's how you see your areas of opportunity



This is your Trust Temperament™ distribution

Temperament	Your Dist.	World Dist.
CR Expert	23.6%	31%
RS Steward	22.1%	21%
RI Doer	19.6%	17%
CS Professor	12.9%	8%
CI Catalyst	10.7%	10%
IS Connector	11.1%	13%

Walking the talk: Making the data meaningful

1. What do you naturally lead with?
2. In what ways do you score low on trustworthiness?
3. How are your scores reflected in your stakeholder challenge?
4. What's one specific action you can take?

$$T = \frac{C + R + I}{S}$$

T trustworthiness
C credibility
R reliability
I intimacy
S self-orientation

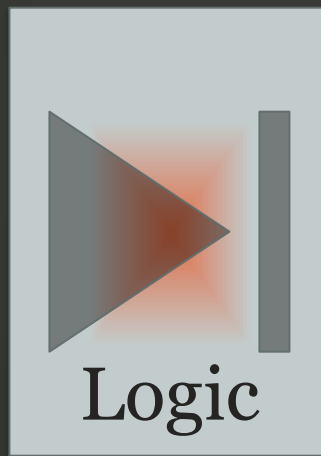
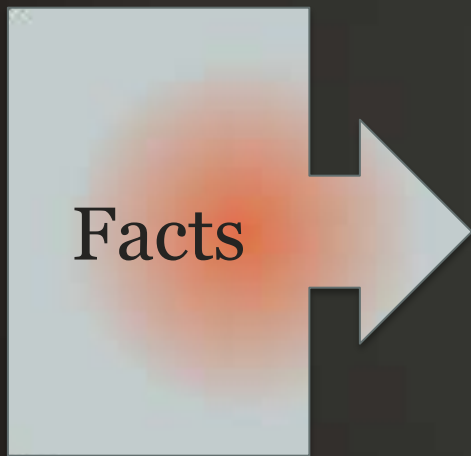
Marshmallows can teach us a lot about trustworthiness



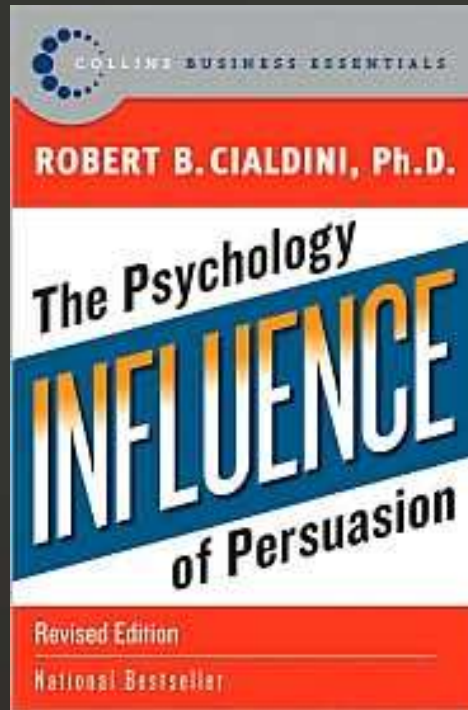
Being More Influential



Influence is as misunderstood as trust

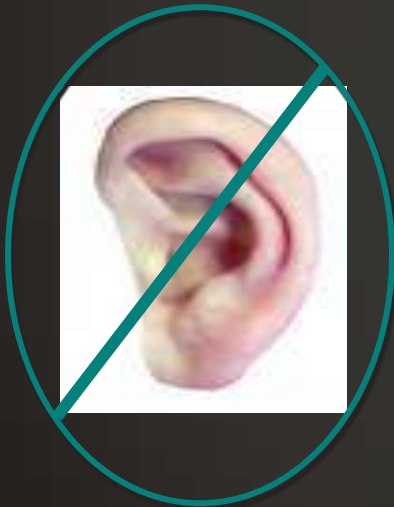


What drives influence might surprise you

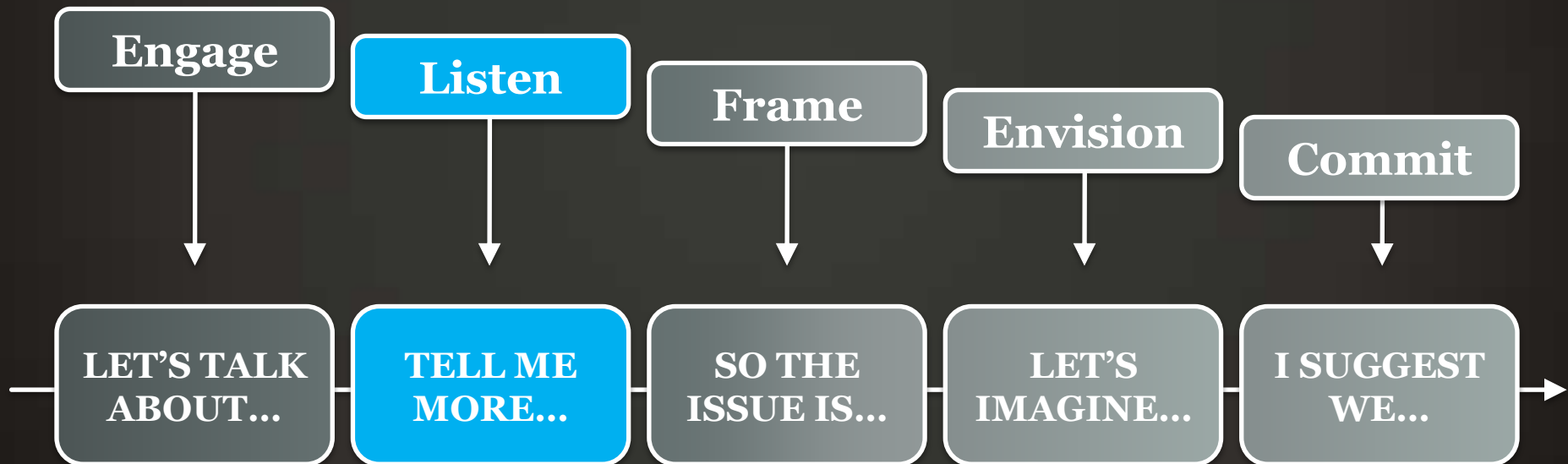


reciprocity

Trust breaks down in conversations in two key ways



Listening matters ... a lot



It turns out the *quality* of our listening
also matters ... a lot



empathy

You have to earn the right to be right

RATIONAL



Paraphrase



NON-RATIONAL



Empathize



Earn the Right

The good news: masterful listening can be learned

	Round 1	Round 2	Round 3
Stakeholder	A	B	C
Listener	B	C	A
Observer	C	A	B

- **Groups of 3 in 3 rounds**
 - *Your own stakeholder*
 - *Listener*
 - *Observer*
- **1-minute setup**

Describe your stakeholder's interests, concerns
- **4-minute role-play**
 - Stakeholder—*be that stakeholder; WEAR THE GLASSES!*
 - Listener—*be yourself and paraphrase and empathize—only!*
 - Observer—*take good notes and keep the others in character*
- **2-minute debrief**
 - Observer—share specific strengths, opportunities
 - Stakeholder—share your experience

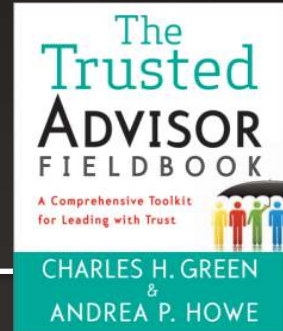
Walking the talk: What did you discover?

- **Listener**—What was hardest about doing this?
- **Observer**—What did the listener do well? What were the opportunities for improvement?
- **Stakeholder**—What was your experience?



What “ahas” did you have as your stakeholder?

Walking the talk: Be a hard grader



Consider your **stakeholder challenge**.

- What haven't you been willing or able to *hear*?
- What might you *listen for*?

ELFEC: from good to great



Walking the talk: Look a little deeper

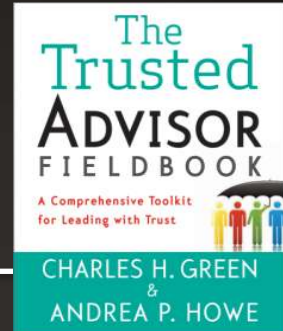
Consider your **stakeholder challenge**.

- What lessons can you apply from the video vignettes?

Walking the Talk



Your toolkit is full



What tools, practices, mindsets, maxims, and ways of being are in your trusted advisor toolkit?

www.trustedadvisor.com/Audigy

And there's more

5 Questions to unlock any relationship issue:

1. What haven't I been HEARING?
2. What haven't I been SAYING?
3. In what ways could I take more RISK?
4. What do I want that I haven't been GIVING?
5. In what ways have I not been BEING a partner?

It takes practice to become natural

“Greatness is how consistently you are doing the right things every day”

—John C. Maxwell

Your 30-day experiment:

Develop a new habit in an area of trustworthiness where you have the most room to improve.

Round out your plan:

Add **1 action** to take on your stakeholder challenge.

In fact, let's practice a little more

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How will you choose ...

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... to be remarkable?