



Being a Trusted Advisor

Chubb Ignite Program | June 4, 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

Mindsets matter

- Trust is personal
- Trust is paradoxical
- Trust is positively correlated to risk



**The
3 P's**

Trust is personal



1. Name
2. Role
3. How many months you have been with Chubb
4. What about Ignite excites you the most
5. An interesting tidbit or factoid that *no one in the room knows about you*

Trust has upside



1. Influence

2. Engagement

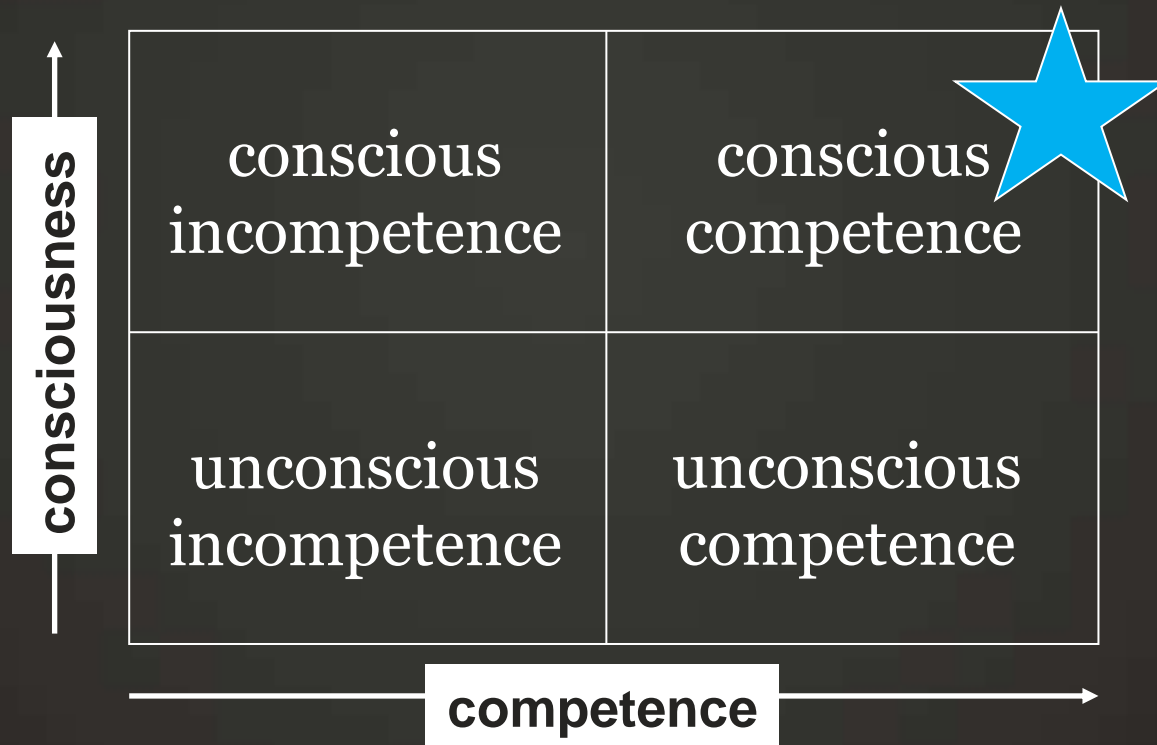
3. Productivity

4. Information sharing

5. Creativity/innovation

What are
the Top 5
benefits of
trust in the
workplace?

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



We'll be covering a lot of ground

Defining
trust



Assessing
trust-
worthiness



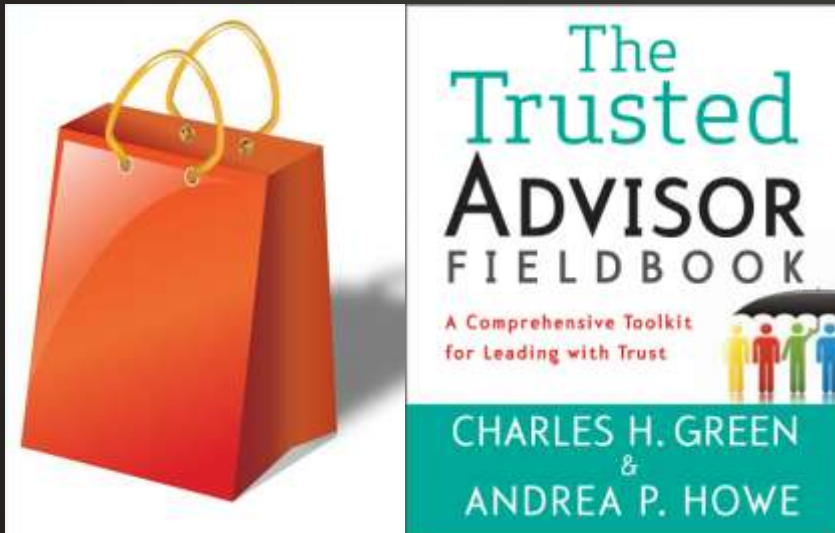
Being more
influential



Walking
the talk



By the way, here's what's in your goodie bag



- Chapter 1
- All worksheets
- “How to Build Trust ... Fast!” eBook
- And more

www.trustedadvisor.com/ChubbIgnite

Building trust starts with being present



Let's make it real

Remember your “relationship challenge”:

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



Say three things out loud

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

Defining Trust



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

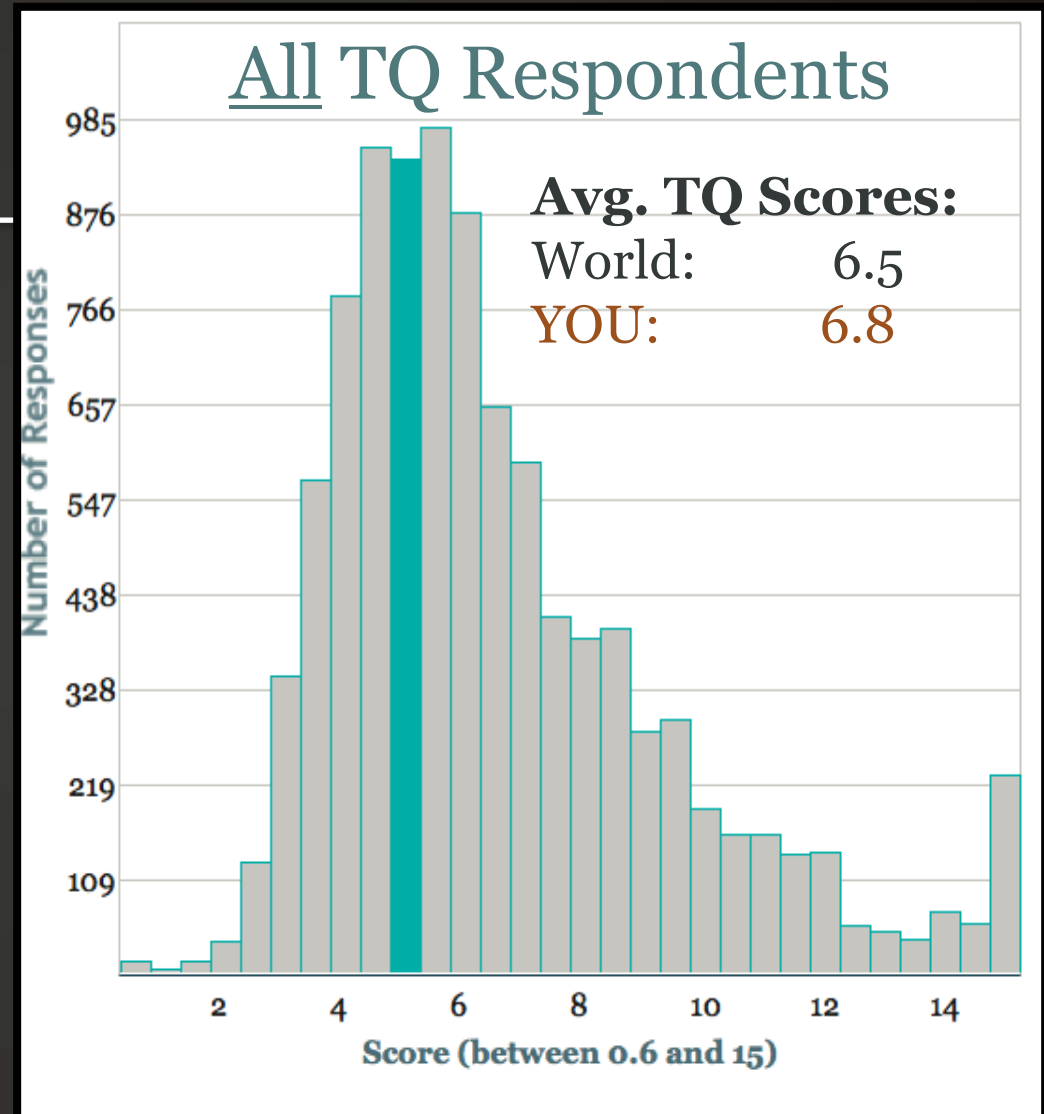


Assessing Trustworthiness

How trustworthy are *you*?

Note: Median skewed left

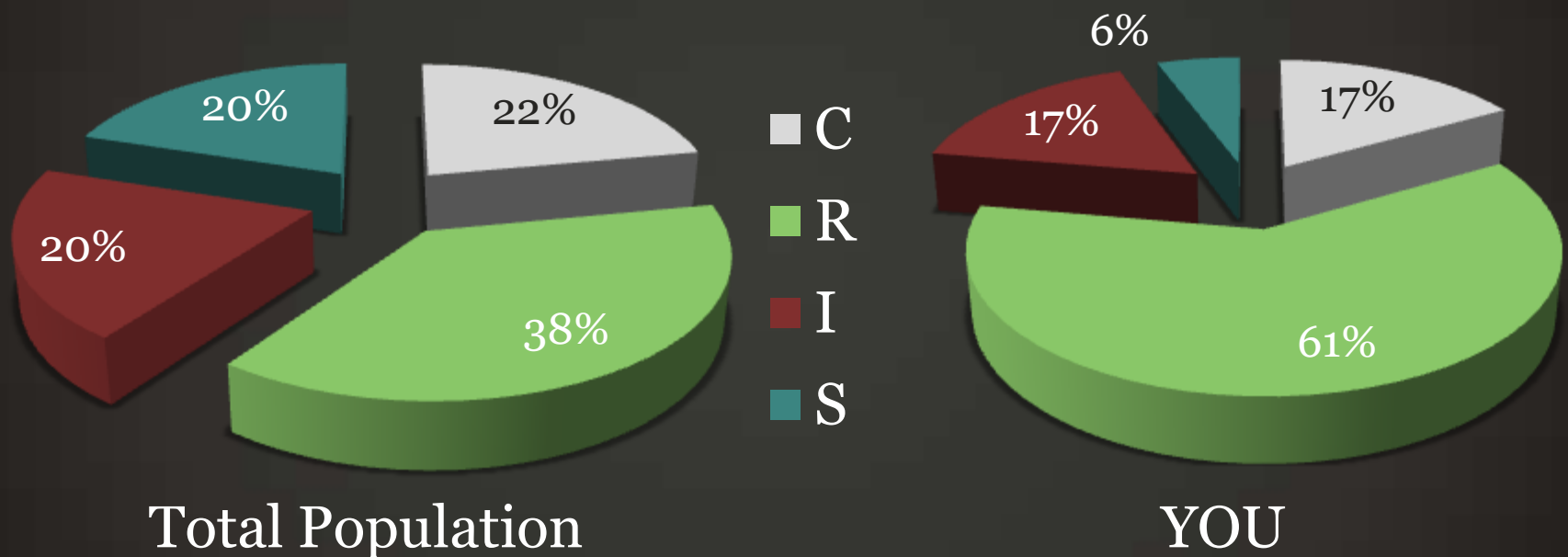
(3 x S)



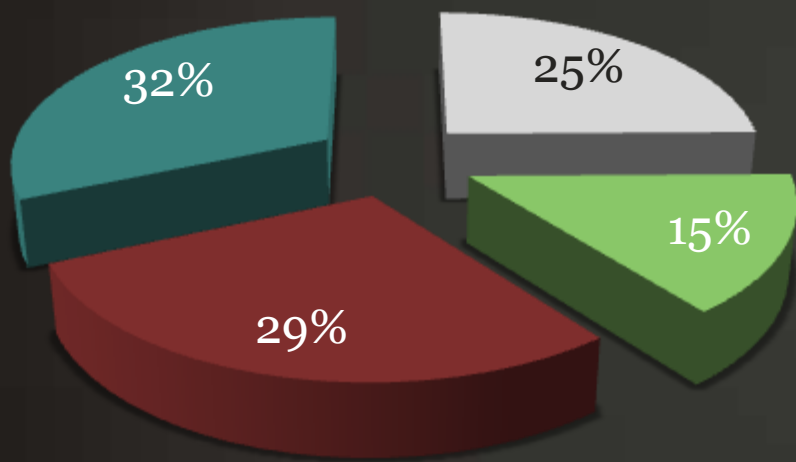
The I's have it

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

Here's how you see your strengths

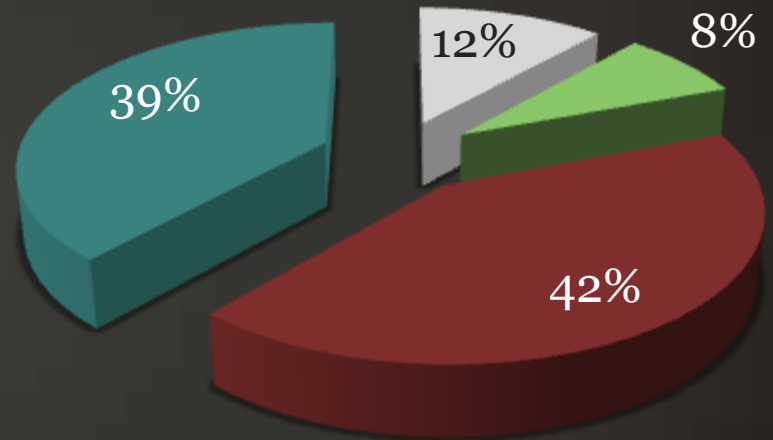


Here's how you see your areas of opportunity



Total Population

■ C
■ R
■ I
■ S



YOU

This is your Trust Temperament™ distribution

Temperament	Your Dist.	World Dist.
RI Doer	19%	17%
CI Catalyst	8%	10%
IS Connector	4%	13%
CR Expert	46%	31%
RS Steward	19%	21%
CS Professor	4%	8%

Let's make it real

1. Consider your overall scores. What's one action you can take to improve your T?

2. Consider your relationship challenge. Which variable needs the most attention?

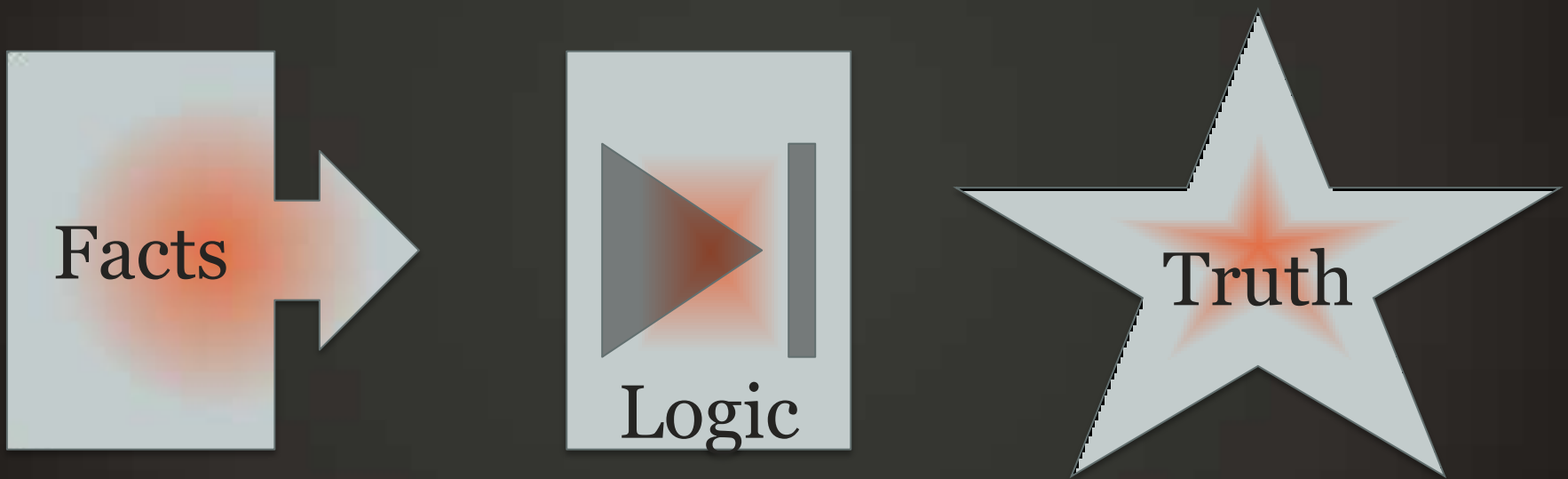
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T trustworthiness
C credibility
R reliability
I intimacy
S self-orientation

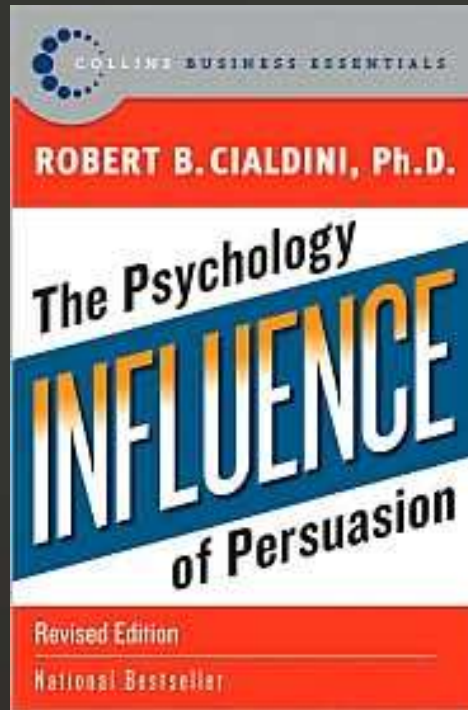
Being More Influential



Influence is as misunderstood as trust



What drives influence might surprise you



reciprocity

Listening also drives sales

“The most pervasive and hardest sales problem? **Premature solutions.** The mistaken belief that the sooner they can begin solving the problem, the more effective they will be.”

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NEIL RACKHAM.

SPIN Selling

SITUATION · PROBLEM · IMPLICATION · NEED · PAYOFF

THE BEST-VALIDATED SALES
METHOD AVAILABLE TODAY.
DEVELOPED FROM RESEARCH
STUDIES OF 35,000 SALES
CALLS. USED BY THE TOP
SALES FORCES ACROSS
—THE WORLD.—

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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
 - Client—share your experience

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?

Let's make it real

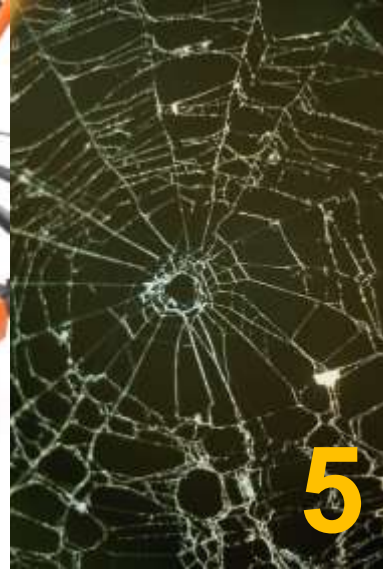
Consider your
**relationship
challenge.**

What haven't you been
willing or able to *hear*?

What might you *listen
for*?



To be influential in the C-suite, know what it's like in their world



Walking the Talk



It takes practice to become natural



2



5



6



1



4



3



7

Let's make it real

“We are what we repeatedly do. Excellence, then, is not an act, but a habit”

—Aristotle

Your 30-day experiment:

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

We've covered a lot of ground

Defining
Trust



Being More
Influential



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worthiness



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Being a Trusted Advisor Key Takeaways

#1. A TRUSTED ADVISOR is a _____.

#2. The THREE P's of trust are:

Trust is p _____

Trust is p _____

Trust is p _____

#3. The TOP 5 BENEFITS of trust are:

1. _____

2. _____

3. _____

4. _____

5. _____

#4. My stakeholder's name is: _____.

#5. CREDIBILITY equates to _____.

RELIABILITY equates to _____.

INTIMACY equates to _____.

SELF-ORIENTATION equates to _____.

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

#6. _____ is the only variable of trustworthiness requiring the passage of time.

#7. Four ways I could RAPIDLY BOOST MY TRUSTWORTHINESS score:

Self-Orientation: _____

Intimacy: _____

Reliability: _____

Credibility: _____

Choose from your bookmark or insert your own.
Download a free eBook that expands on the [15 Ways to Build Trust ... Fast!](#)

#8 According to Cialdini

is a primary driver of INFLUENCE



How will you choose ...

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... to set yourself apart?