



Being a Trusted Advisor

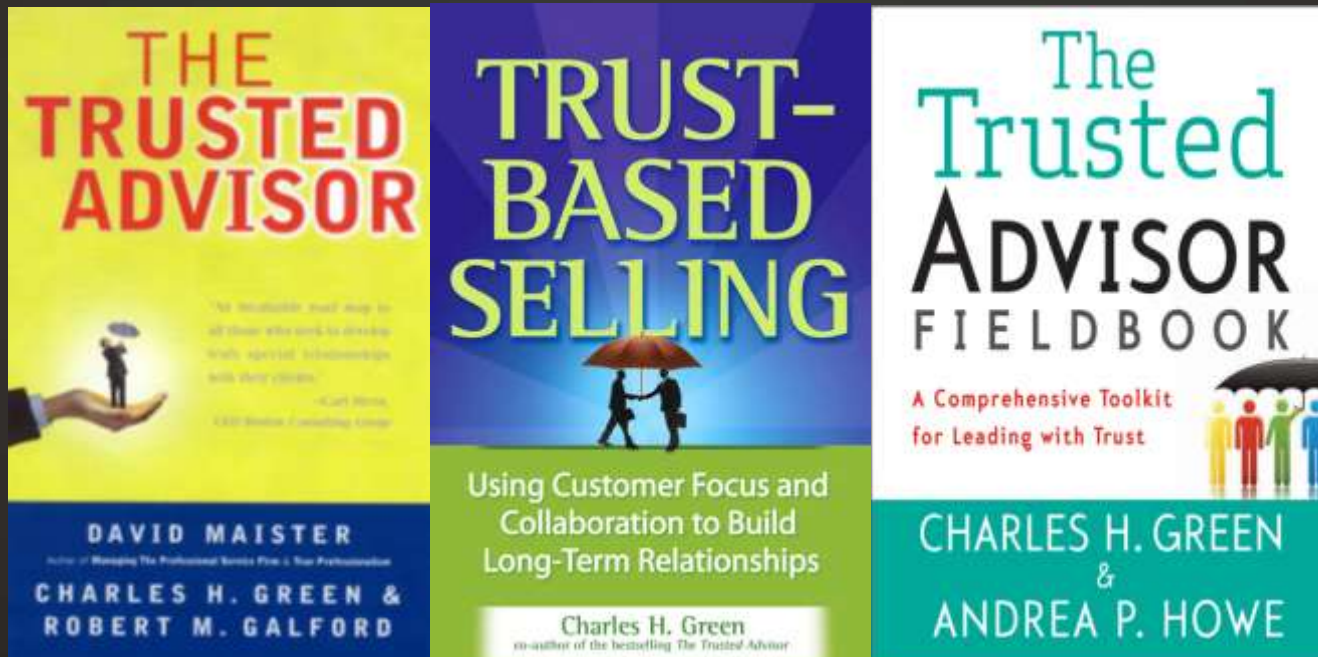
Chubb Southeast Region | March 6, 2014



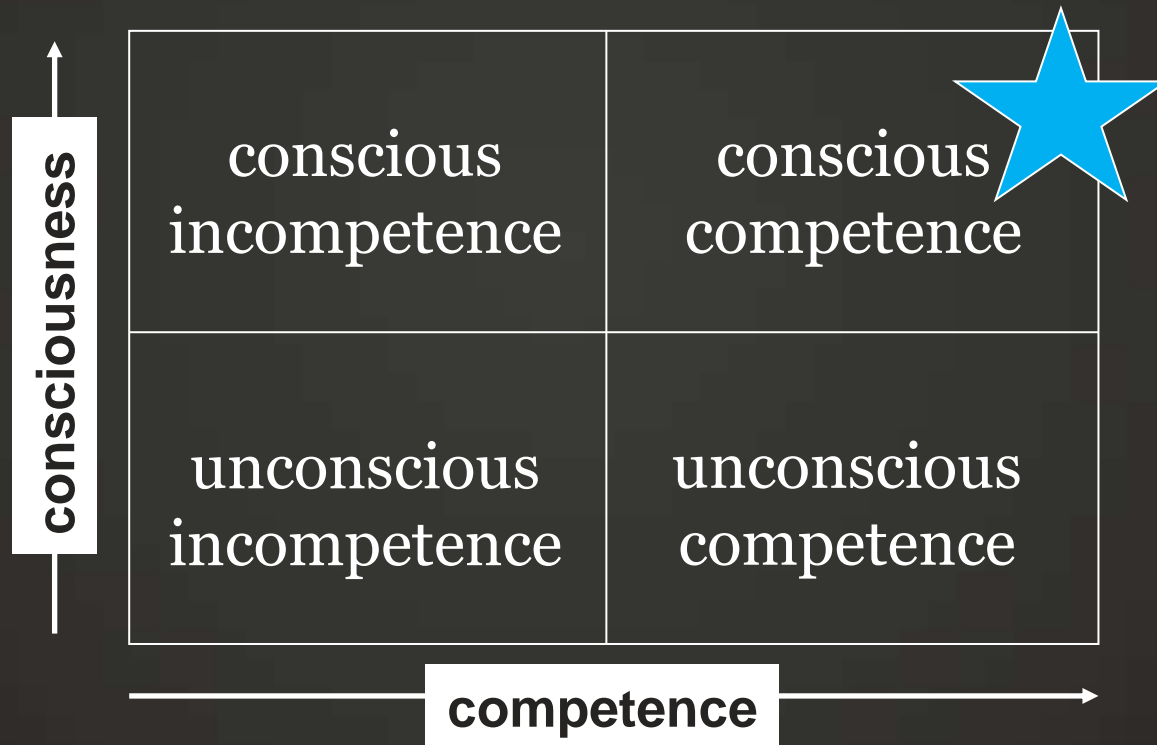
In this “moment of truth,” what should I do?

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

These are our building blocks



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



Here's our roadmap

Morning Afternoon

Defining
Trust



Assessing
Trustworthiness



Saying the
Hard Stuff



Saying the
Hard Stuff
(cont.)



Being More
Influential



Walking
the Talk



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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**

Collaboration is simple ...

... not easy

What
collaboration
challenges/
barriers do
you face
within the
region?

The 4 Levels of Relationship define your personal value

4.

Safe haven
for tough
issues

3.

Idea-
generator

2.

Problem-
solver

1.

Information-
giver

Remember your homework?

Recall 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



Walking the talk: How do you see your value?

Thinking about your **relationship challenge**, 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

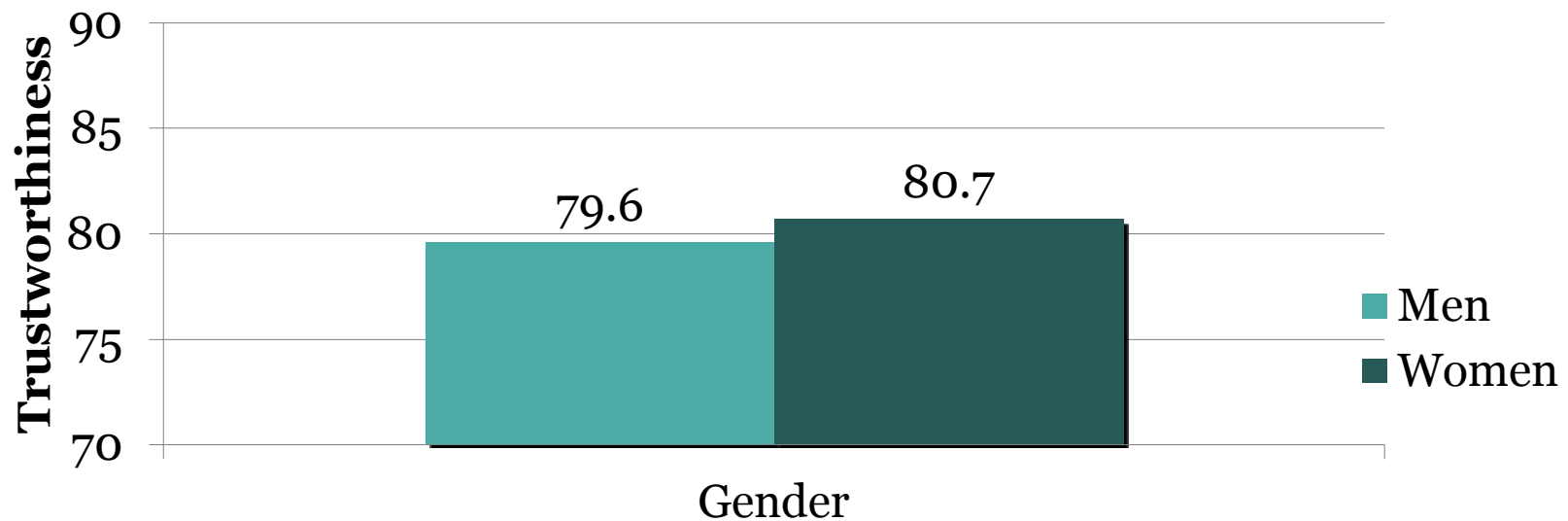
15. Relax your mind



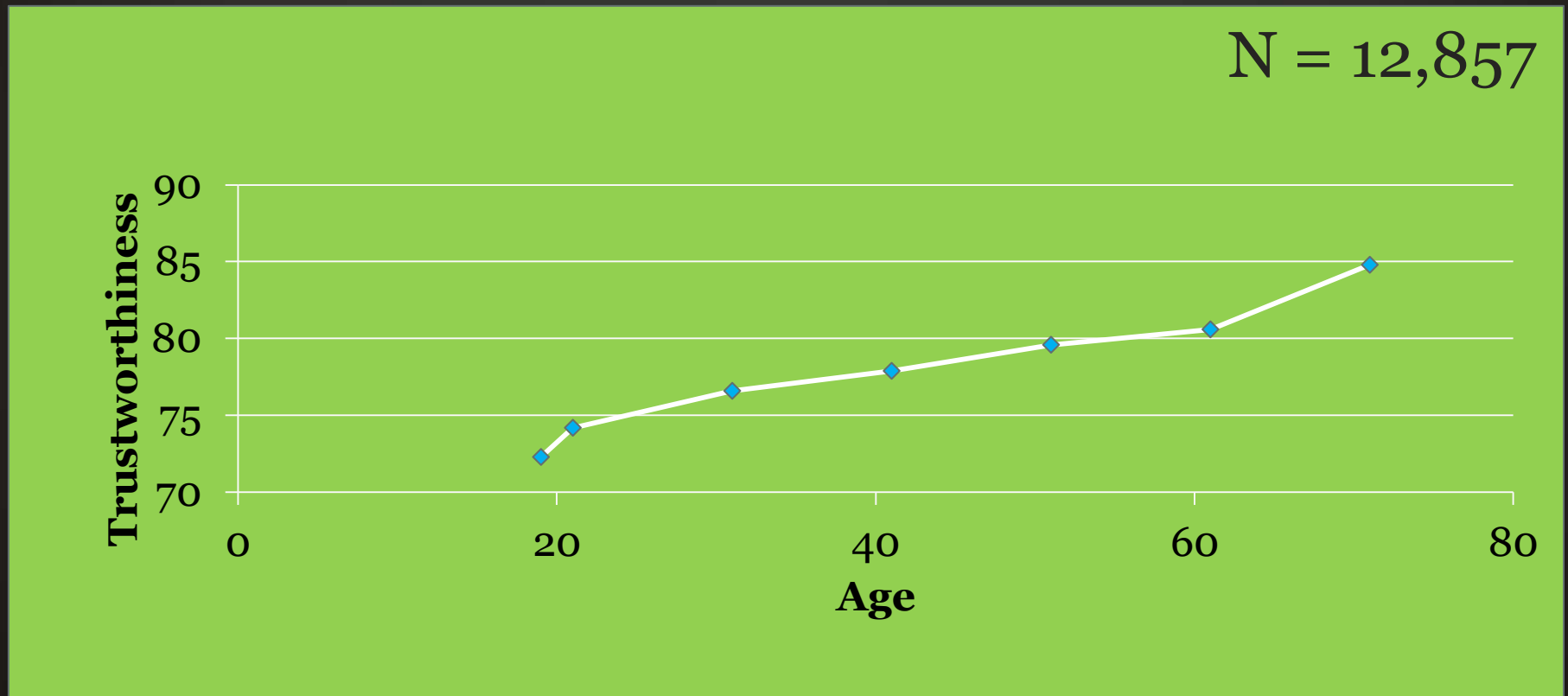
Assessing Trustworthiness

Who's more trustworthy: men or women?

N = 12,857



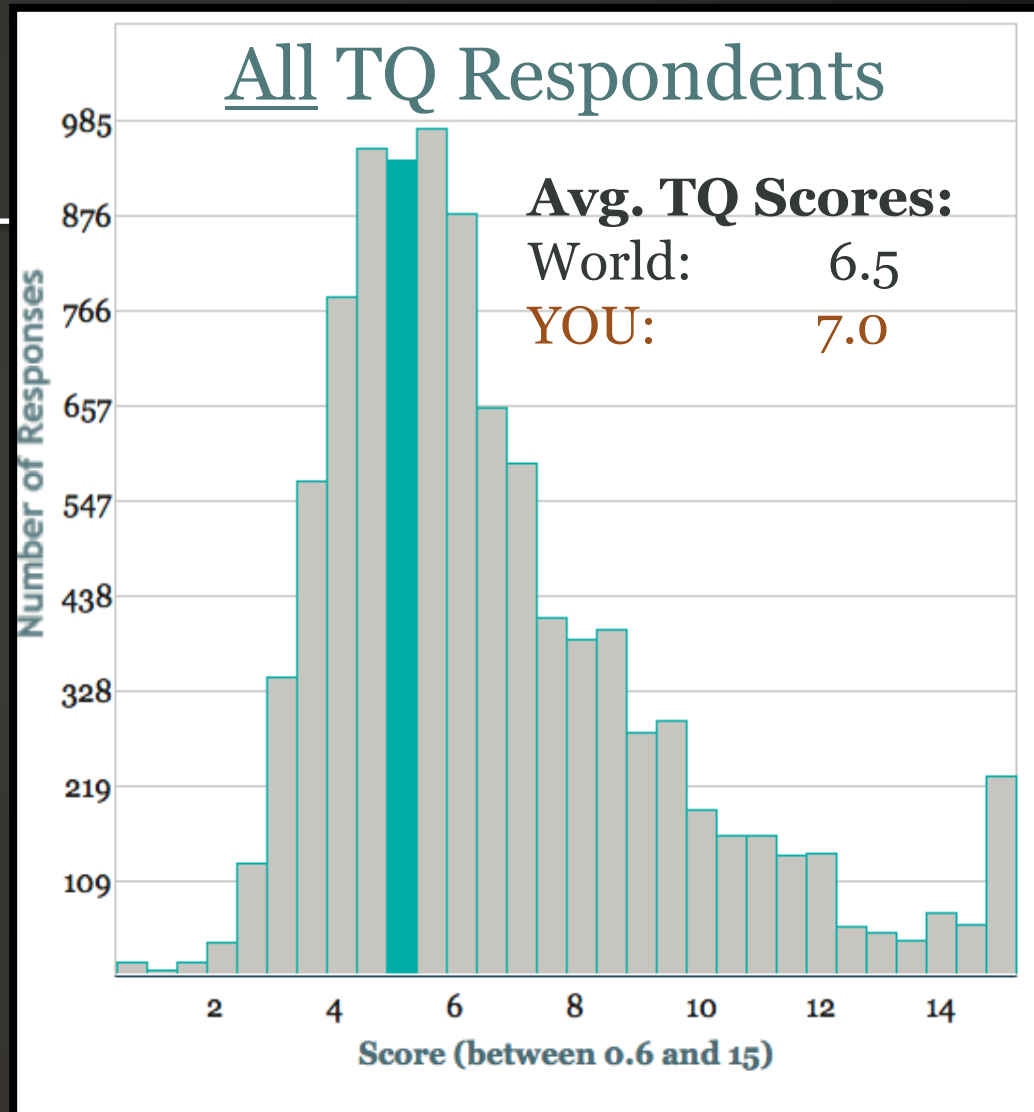
Do we get more or less trustworthy as we age?



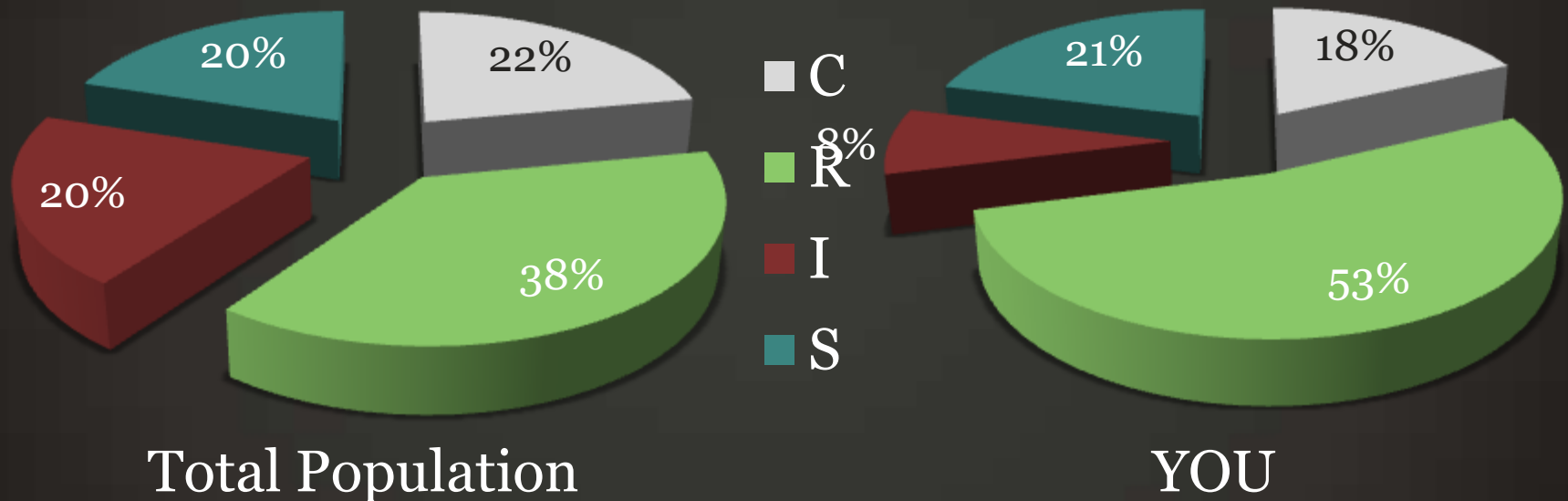
How trustworthy are *you*?

Note: Median skewed left

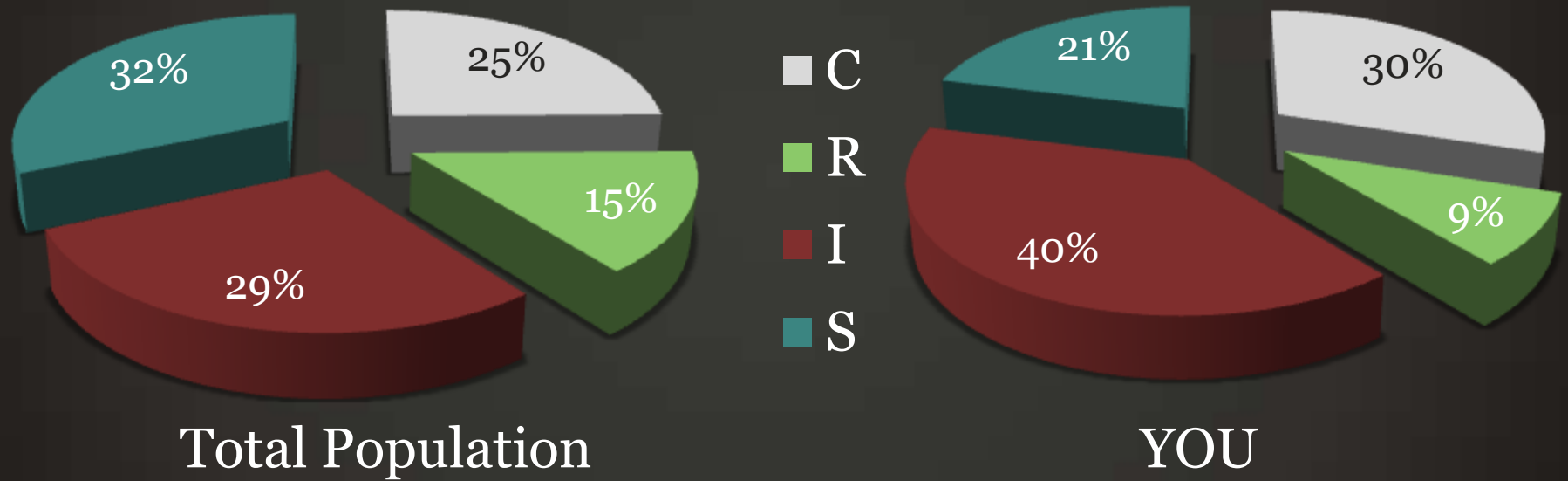
(3 x S)



Here's how you see your strengths



Here's how you see your areas of opportunity



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 relationship 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

Saying the Hard Stuff



What tough
messages do you
have to deliver?



Well, this is embarrassing.

Firefox is having trouble recovering your windows and tabs. This is usually caused by a recently opened web page.

You can try:

- Removing one or more tabs that you think may be causing the problem
- Starting an entirely new browsing session

Restore Windows and Tabs

- ✓ Window 1
 - ✓ Facebook
 - ✓ Time Out | Vicki Elam
 - ✓ Go Easy on Yourself, a New Wave of Research Urges - NYTimes.com
 - ✓ Invoice: Andrea Howe
 - ✓ Google Docs - All items
 - ✓ Trusted Advisor - Consulting Skills - London

Name It and Claim It is as easy as 1-2-3

1. Clarify the issue (Tip: 10 words or less)
2. Inventory all concerns, risks, fears
(*yours*)
3. Use caveats to say them out loud

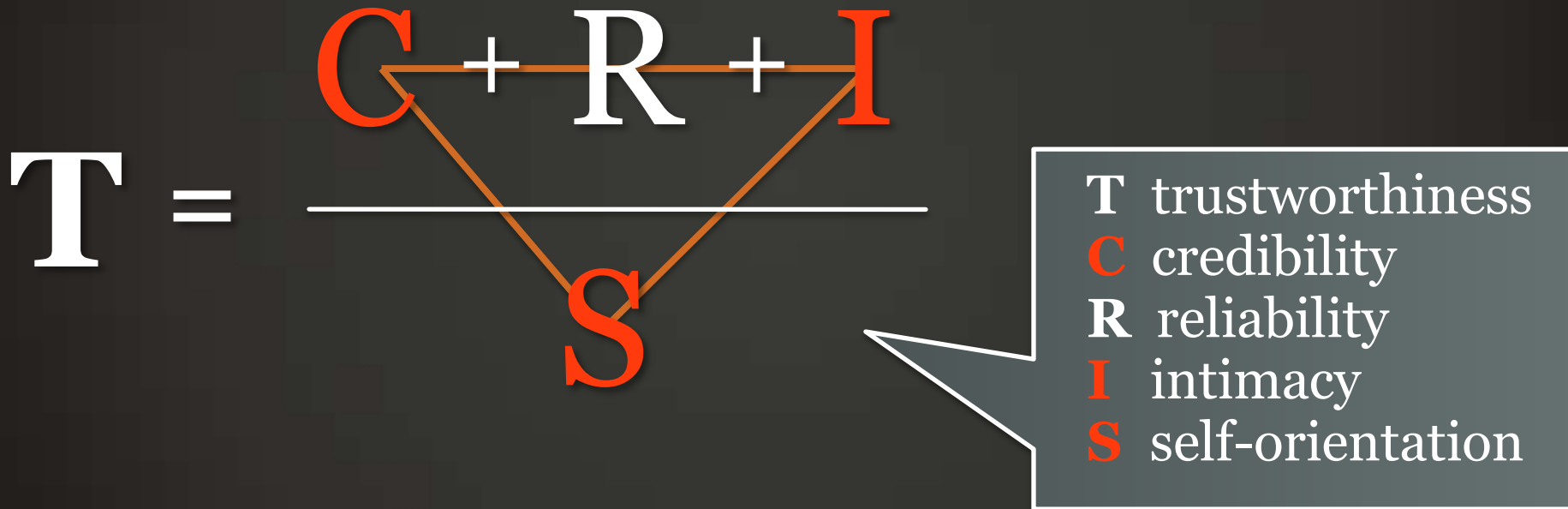
Caveats are conversational jewels

- “There’s really no easy way to say this ...”
- “You’re not going to like what’s coming ...”
- “At the risk of embarrassing myself ...”
- “I may be completely missing the mark ...”
- “I’m going to go out on a limb ...”
- “This is awkward ...”

Name It and Claim It is a socially acceptable way to put hard truths on the table

- “I may be completely missing the mark here, and I sure don’t want to step on any toes. I’m concerned we don’t have the executive sponsorship we need.”
- “There’s really no easy way to say this. We’re not going to make the deadline.”
- “At the risk of embarrassing myself, I’ve lost sight of what we’re really trying to accomplish.”

Saying the hard stuff can be a trust trifecta



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

Let's make it real

Consider your **relationship challenge**.

- What haven't you been saying that needs to be said?
- How might you Name It and Claim It?

Walking the talk: Lunch and learn

Share with at least two
(new) people:

How you can
apply what
you're
learning to
improve
collaboration
within the
region?

The Case of the Travel Agent

You're the Travel Agent: What's your minimum acceptable outcome?

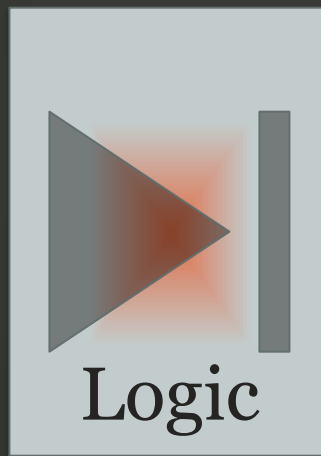
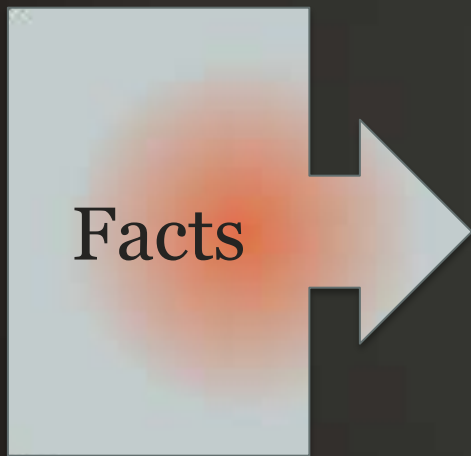
Ideal outcome?



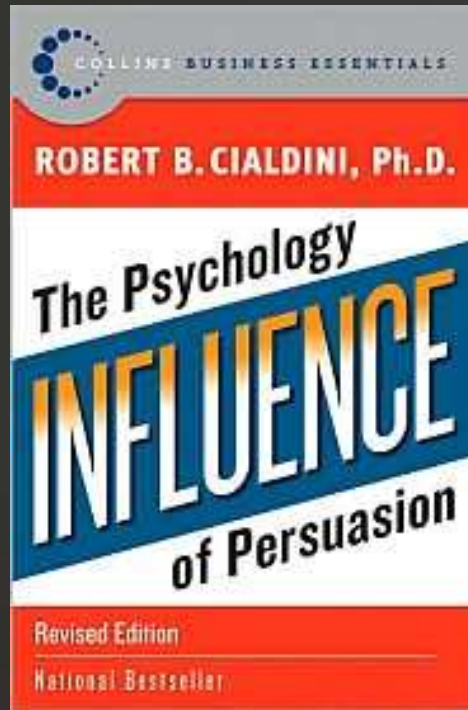
Being More Influential



Influence is as misunderstood as trust



What drives influence might surprise you



reciprocity

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

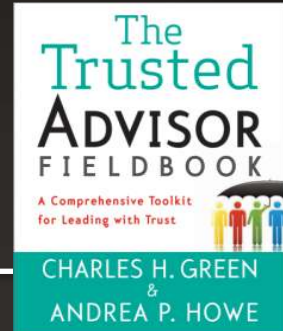
Walking the talk: What did you discover?

- **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



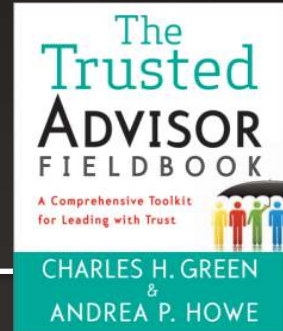
Consider your **stakeholder challenge**.

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

Walking the Talk



Your toolkit is full



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

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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?

Walking the talk: Collaboration redux

Discuss at your tables:

How you can
apply what
you've learned to
the collaboration
challenges you
identified this
a.m.?

It takes practice to become natural

“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.

Round out your plan:

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

In fact, let's practice a little more

#38



How will you choose ...

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... to blow their hair back?