



CBC Conversations

Trusted Advisor: Walking the Talk

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Caribbean and Bermuda Cluster
OCEO Account Teams Webinar
January 9, 2014



Andrea Howe



Stephen Kuzyk

Trusted Advisor: Walking the Talk

Hello!

If you could be on vacation right now
anywhere in the world, where would you be?

Enter your reply in the text chat box now.

Meet Andrea Howe



Who or what inspires you?

People who are authentic, creative, and courageous enough to stand out in the crowd. Children and their unbridled way of expressing themselves.

Biggest success in your career to date?

Co-authoring *The Trusted Advisor Fieldbook*. It was a true labor of love and being a published author has opened many doors for me.

If you weren't at Trusted Advisor Associates, or in this field, what would you do?

I'd be a full-time (rather than very, very part-time) mosaic artist—although I'm not sure I'd do it for money as I love creating art simply for the sake of creating art.

That's not Stephen, that's Robert Scoble



Photo courtesy of [Thomas Hawk](#)

Scoble and Santa both understood something important about trust



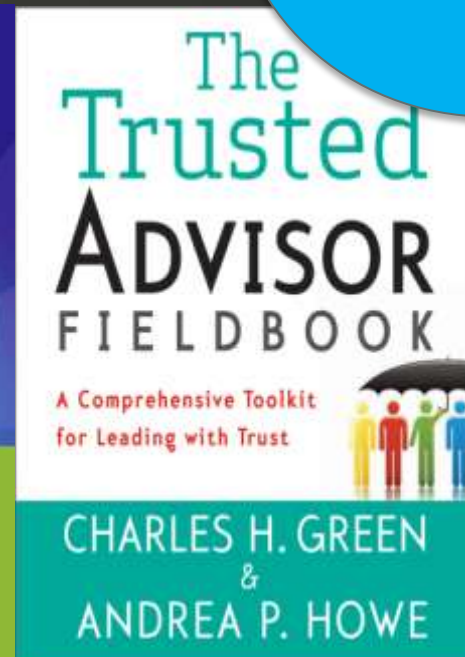
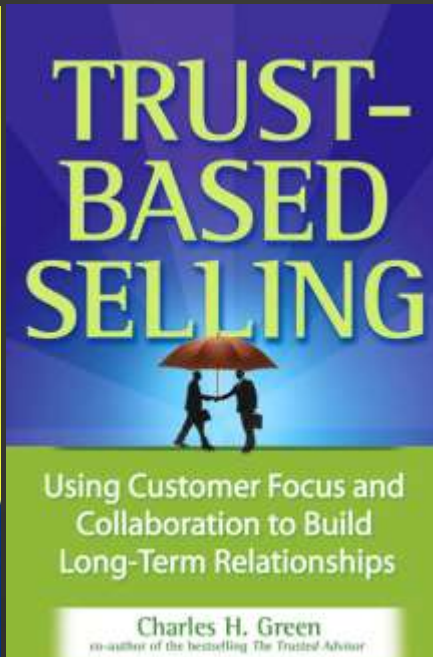
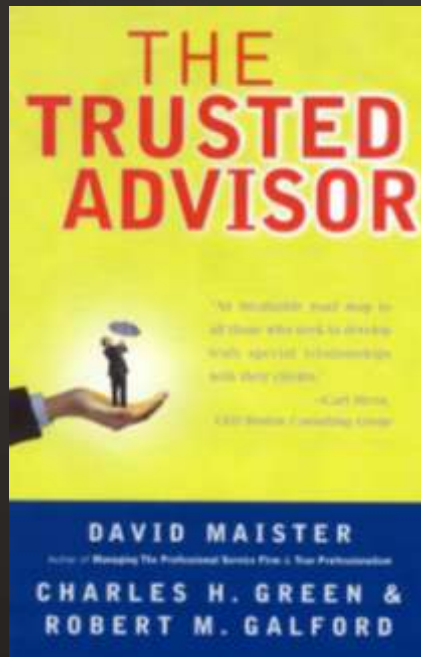
Today we'll answer this question:

How can you
walk the talk of a
trusted advisor—
especially with
your key
accounts?

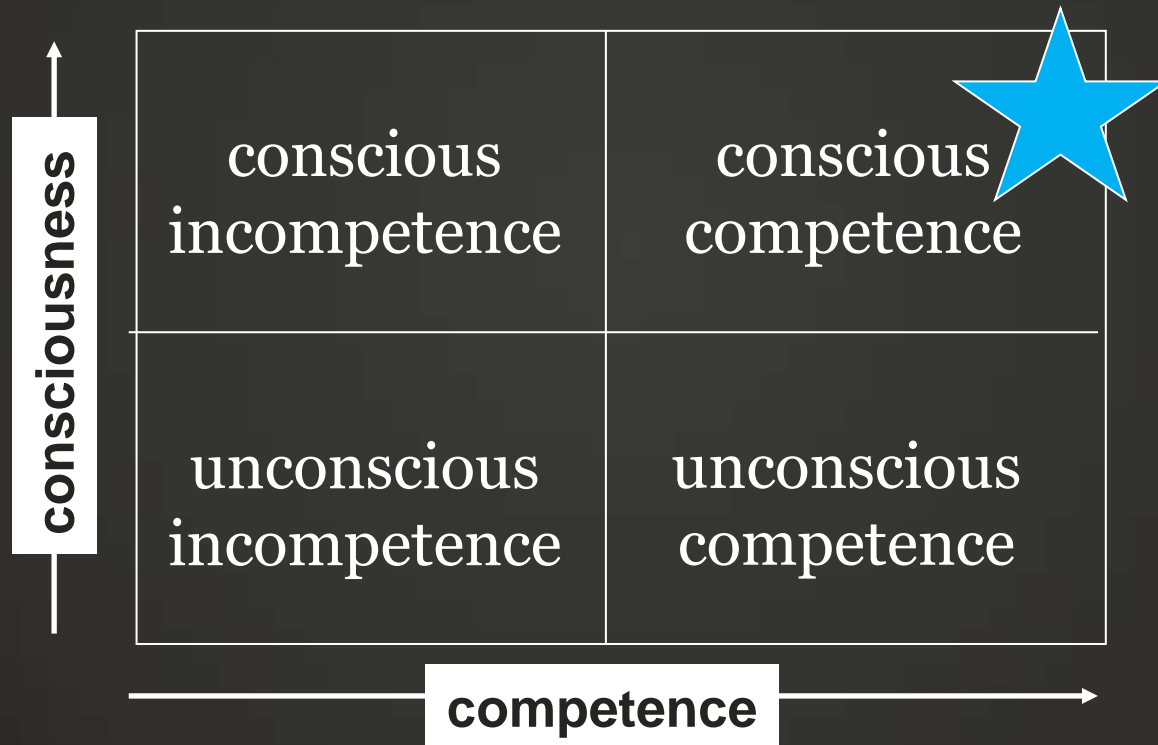


These are our building blocks

15



Bad news alert: We've all got barriers to overcome to be masterful



Who's *your* trusted advisor?

Close your eyes and bring to mind **your own trusted advisor**—someone you can talk to about a wide range of issues, professional as well as personal, sensitive and not.

Then **type into the text chat box** the first words that come to mind to describe this person.

Looking up “trust” is a waste of time



Self-orientation is about focus

$$T = \frac{\quad}{S}$$


T trustworthiness

S self-orientation

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

SHIFT THE PENDULUM

a desire to

versus

meet my goals



invest

avoid



engage

control



relate

**focus on the
short-term**



**focus on the
long-term**

OVERCOME BARRIERS

Get off your “S”

1. Slow down; avoid “premature solutions”
2. Let *them* steer the conversation
3. Make referrals
4. Manage your “stuff”

Intimacy relates to safety

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

T trustworthiness
I intimacy
S self-orientation

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



Pioneer

Driver

Integrator

Guardian



Go soft

5. Listen deeply
6. Share something personal
7. Ask questions others would be afraid to
8. Tell your client something you really appreciate about him

Credibility has to do with words

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

T trustworthiness
C credibility
I intimacy
S self-orientation

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

Speak candidly and confidently

9. Have a point of view
10. Say “I don’t know”
when you don’t
11. Admit it if you
screwed something
up
12. Above all else, be
genuine

Reliability is based on actions

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

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

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

4. Mind the little things

- 13. Make lots of small promises
- 14. Communicate early and often
- 15. Adapt to *their* norms

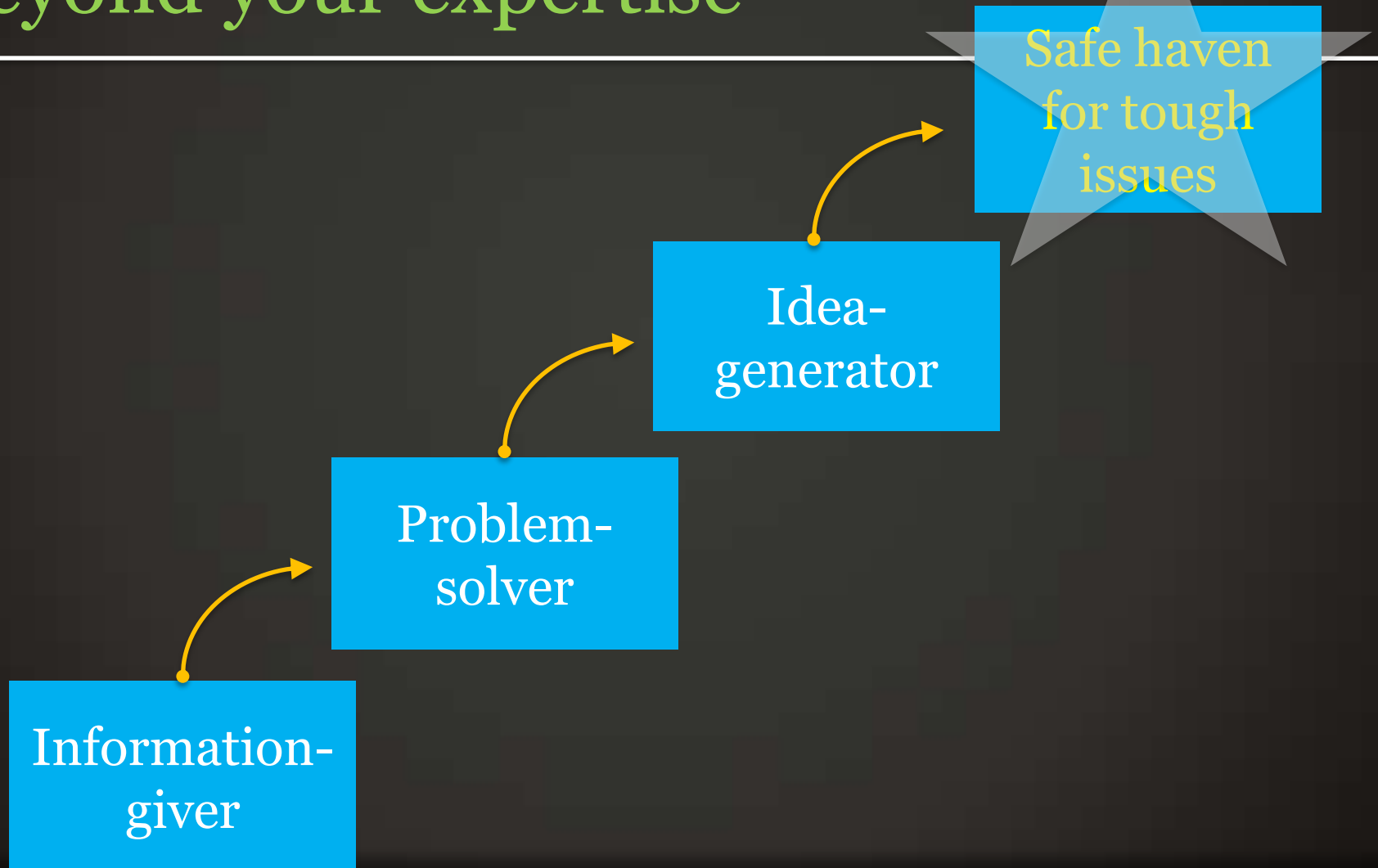
How does your trusted advisor score?

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

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

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

A key theme: your value goes far beyond your expertise



But wait!



How can you
accomplish all this in
the face of too much
to do in too little
time?

Here are 4 ways to deal with time scarcity

1. Mind your mindset
2. Focus on quality, not quantity
3. Relentlessly reduce time-wasters
4. *Be more than do*

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.

Try the free TQ at
<http://trustsuite.trustedadvisor.com/>

Set yourself up for success



- Make it simple and FUN
- Focus on one small thing
- Be very specific about it
- Make it once a day, 2x a week, or 10x total—just stick to it
- Experiment with people outside of work

Your worksheet provides 30+ examples

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YOUR 30-DAY EXPERIMENT

GOAL

The following 30-day habit is an act of kindness to others you have the opportunity to interact with.

SPECIFICS

Focus on your greatest opportunity: choose either Credibility, Reliability, Intimacy or Self-Oriented.

TIPS

- Make your experiment simple and FUN
- Choose one thing to try; don't pile on
- Be very specific about what you're going to practice—"Be a better listener" is too general
- Work the muscle every day, or twice a week, or 8 times in the next 30 days—you decide, just commit and stick to it
- It's ok to experiment on/with people outside of work. The goal is to form the habit; it doesn't really matter how and with whom

SOME EXAMPLES

Choose one experiment from the list below or design your own.

Credibility	Reliability
Write one short blog a week that shares your lessons learned with others (whether you publish it or not; status: like, retweet, etc.)	Document the promises you make and regularly remind others to share who was promised by the 30-day commitment approach
Do 10% more preparation than you normally would for every meeting	Assess and prioritize your to-do list every Monday, Wednesday, and Friday
Share your passion, not just your expertise, in your next 5 presentations	Make three small promises a week and consistently follow through
Name it and claim it with 5 people you've been avoiding, or have interacted with	Create a new routine in at least four relationships (such as regular meetings, mass emails)
Keep a daily journal of your observations of others who have "promised" what they do to convey that, and how you might adopt some of their habits	Answer five minutes each day to every scheduled meeting
f	f
g	g
h	h

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Intimacy

Self-Oriented

OBSERVATION S

Use the space below to reflect on, and track, your progress.

C: Do 10% more prep for every meeting

R: Arrive 10 minutes early M/W/F

I: Send 10 hand-written notes

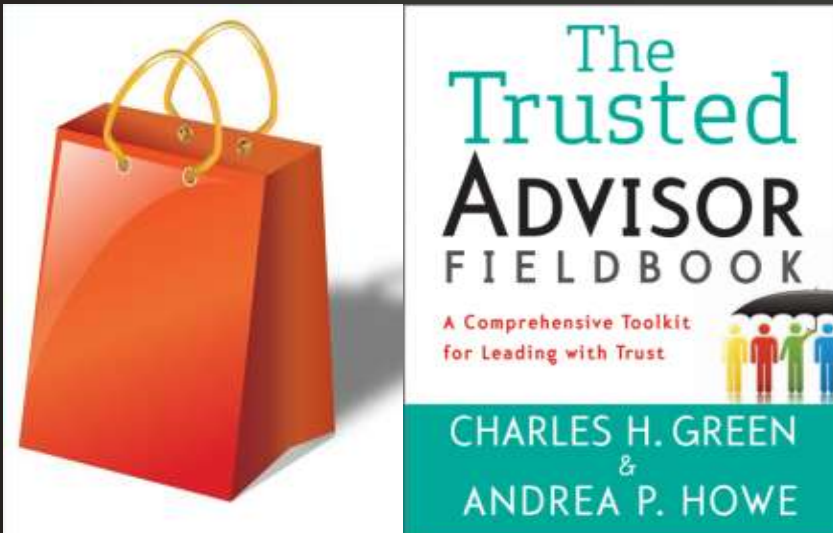
S: Practice 1 act of anonymous kindness a day

Your turn

Insights?
Points of view?
Questions?



Here's what's in your goodie bag



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

www.trustedadvisor.com/DeloitteCBC



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