

The Trusted ADVISOR FIELDBOOK

A Comprehensive Toolkit
for Leading with Trust



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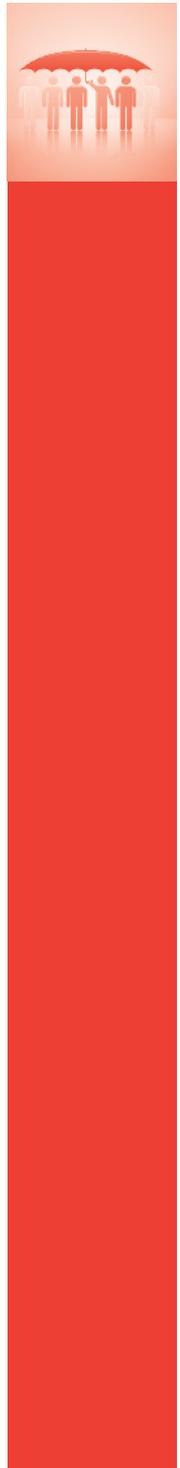


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A Trust Primer



1 Part

U.S. Supreme Court Justice Potter Stewart once despaired of defining obscenity, but noted pointedly, “I know it when I see it.” Trust is much the same. People know when it exists and when it doesn’t, but cannot explain why or how it exists. And the concept of building trust seems even harder to describe, let alone implement.

We have made it our life’s work to better understand trust. Before we can discuss trust, however, we begin by putting it in context—without context, there is just theory and no practical implications. We could have simply suggested you do this or do that to build trust. That would only get you so far.

So we begin with a primer. This first section defines the key terms and concepts of our trust framework. We walk you through the difference between trusting and being trustworthy, along with other fundamental truths about trust. We also explore the dynamics of influence, which are important to grasp if you wish to consistently lead with trust.

Three frameworks will help you create personal and organizational trust:

- Attitudes—mind-sets or beliefs that provide fertile soil for trust.
- Models—three simple structures for understanding and applying trust.
- Essential Skills—the indispensable abilities and capacities of trust building.

With this solid foundation, you will be well equipped to put the practical tips, strategies, and best practices of later sections to work.

Fundamental Truths



1 Chapter

Building trust can be a surprisingly simple thing—yet it is anything but easy. Trust is a complex concept in human relationships. It is often misunderstood, even though it is something practiced somewhat unconsciously all the time. We intend this book to do double duty: to give you practical, commonsense advice, while at the same time allowing you to think critically and speak fluently about trust.

In this chapter we take aim at the complexities of trust, breaking it down so that it can be managed and more readily increased. We take a critical look at the paradoxes, dynamics, and language of trust. We explore maxims, such as “Trust is personal,” “Trust takes time,” and “There is no trust without risk.” We also describe the relationship between trust and influence and reveal the key that unlocks the mystery to being influential.

Fundamental Truth 1: Trust Requires Trusting and Being Trusted

Too often people use the word *trust* when what they mean is something else. In plain language, people talk about *trusting*—being willing to take a risk. People also talk about being *trusted*, or being *trustworthy*. When one person trusts and another is trustworthy, there is trust.

It is important to remember the distinction between trusting and being trustworthy. Usually, leading with trust requires you to focus on being *trustworthy*. However you cannot avoid occasionally having to do the *trusting*.

Fundamental Truth 2: Trust Is Personal

When trust is discussed, it usually refers to people. Yes, you can trust a company, but when you do, you are typically focusing on just one part of trust—dependability. It makes perfect sense to say a company or organization is dependable or reliable. It does not make much sense to say that a corporate entity has your best interests at heart or is sensitive to your needs, or is discreet. Those are things you would usually say about people.

Even when it does make sense to say an organization is credible or careful or focused on your interests, the reference is usually to the people in it. At root, trust is personal.

CASE STUDY

From the Front Lines: Trusting the Taxi Driver¹

During a trip to Denmark, I (Charlie) took a taxi from my hotel to the local train station. The fare was 70 kroner (about 15 U.S. dollars). I gave the driver a 200-kroner note. He gave me back 30 kroner change. Clearly something was wrong.

I realized I had three options for dealing with this little unpleasantness:

1. I could assume the taxi driver made a mental slip, and politely point with a smile at the note that was still in his hand, so he would notice his error.
2. I could assume he was trying to cheat me—but since he still had the 200-kroner note in his hand, I could just sternly point to it, and let him pretend it was an honest mistake.
3. I could assume he was trying to swindle a foreigner, and respond in anger: “You’re short, buddy; give me the other 100, and you can forget about a tip.”

I went with option one. I noted my suspicions, but chose not to act from them. The driver quickly gave me the extra 100 kroner back with a smile as if to indicate, “Oops, my mistake,” and I chose to believe him.

The thing about trusting is that it’s catching. The way you behave toward others influences the way they respond back to you. Whether you expect the best or the worst of people, you’ll almost always be right.

—Charles H. Green

Fundamental Truth 3: Trust Is about Relationships

That trust is about relationships seems an obvious point. Yet many people in business slip all too easily into self-absorption by focusing in ways that take their attention away from the person whose trust they are looking to gain. There is no such thing as a *solitary* trusted advisor—the term itself implies a relationship.

A major factor affecting trustworthiness is the issue of whether you are self-focused or other-focused. A great phrase to remember is this: “It’s not about you.” If you can remember that, then you will always remember trust is about relationships.

Fundamental Truth 4: Trust Is Created in Interactions

You will not become a trusted advisor through great marketing programs, great presentations, or even great blogs or tweets. Trust is created in your exchanges with others—especially one-on-one. That requires mastering the art of conversation, which you will learn to do using the Trust Creation Process: Engage, Listen, Frame, Envision, and Commit.

Fundamental Truth 5: There Is No Trust without Risk

Ronald Reagan, the fortieth president of the United States, was known to quote a Russian proverb, “Trust, but verify.” For our purposes, the opposite is true. Real trust does not need verification; if you have to verify, it is not trust.

Insight: The Three Ps of Trust

The Three Ps represent the core of our thinking on trust. This mnemonic device is designed to help you remember them:

1. Trust is Personal.
2. Trust is Paradoxical.
3. Trust is Positively correlated to risk.

Ready to start your new trust-based mind-set? Mind your Ps.

Sometimes businesspeople forget this and try to ameliorate or mitigate all risks. This is particularly true in professions like law, finance, or banking. But the essence of trust contains risk. A trust relationship cannot exist without someone taking a chance—and it is your job to lead the way. If you think, *I can't take that kind of risk yet because there's not enough trust in the relationship*, check your thinking. It is the very *taking of risks* that creates trust in the relationship.

Fundamental Truth 6: Trust Is Paradoxical

Over and over again, you will discover that the things that create trust are the opposite of what you may think. That is why we say trust is paradoxical—in other words, it appears to defy logic. The best way to sell, it turns out, is to *stop trying to sell*. The best way to influence people is to *stop trying to influence them*. The best way to gain credibility is to *admit what you do not know*.

The paradoxical qualities of trust arise because trust is a higher-level relationship. The trust-creating thing to do is often the opposite of what your baser passions tell you to do. Fight or flight, self-preservation, the instinct to win—these are not the motives that drive trust. The ultimate paradox is that, by rising above such instincts, you end up getting better results than if you had striven for them in the first place.

Fundamental Truth 7: Listening Drives Trust and Influence

One of the most important drivers of influence, says Robert Cialdini,² is reciprocity—the tendency to return a favor. If you do X for me, I will do Y for you. The inverse is true as well: If you do not do X for me, I will not do Y for you.

Reciprocity in trust-based relationships begins with listening. Listening is the skill that drives trust and influence. If you listen to me, I will listen to you. If you do not listen to me, I will not listen to you.

Fundamental Truth 8: Trust Does Not Take Time

Contrary to popular wisdom, people make serious judgments of trust very quickly. Trust is a mix of the rational and the emotional and snap emotional judgments are commonplace. People decide almost instantaneously whether they trust you—without much proof.

The one exception is trust-as-reliability. Since reliability requires the passage of time to assess, that kind of trust necessarily takes time: others—not so much.

CASE STUDY

From the Front Lines: The Power of Personal Connection

Larry Friedman, former Executive Vice-President at Gallagher Benefit Services, one of the largest employee benefit agencies in the northeast United States, tells a story of going beyond professional boundaries to make a difference for someone in a very personal way.

“My client, Harold, and I happened to have a meeting several years ago in the January time frame. Harold and I had known each other professionally for over 20 years. During that time, he had progressed from bookkeeper to controller to CFO. My guess is that during these years he had also maintained a steady weight of 270 pounds—a lot for his 6-foot frame.

“It was a new year and I was focused on my own goal-setting for the year. It suddenly occurred to me to ask Harold about his goals. He said he wanted to take the weight off in a healthy way, once and for all.

“We created a structure, right then and there, to help him meet that goal. We wrote it down and reviewed his progress monthly. He joined a weight loss program, discovered he liked going to the gym, got a personal trainer, and worked out regularly.

“Then he mentioned that he had been running regularly on a treadmill. I had been a runner for many years. I found a five-kilometer race near Harold’s home, and said, ‘If you sign up, I’ll not only help you train for it, I’ll run it with you.’ He had never run that far in his life.

“I suppose it would have been easy to say, ‘I’ll be rooting for you. Call me and tell me how it went.’ But I really wanted to do it with him. It was risky for both of us: risky for me to offer, and risky for him to accept.

“He did accept my offer. When the race day arrived, he was determined to run it, not walk it. I ran next to him the whole way, and we finished the race together.

“To this day, Harold still runs, takes long walks with his wife, and has maintained a healthy weight for more than three years. In fact, this year he ran a 5K race on his own while raising money for a cause that he believed in. He’s a client for life as a result of our experience together. More importantly, he’s a friend for life.

“I have always believed that if I could help someone get more of what’s important to him as a person, then everything else will take care of itself. I don’t know *how* that happens—I’m not that scientific about it—but I believe it. I always taught people at Gallagher that when they build a personal relationship, it affects their business relationship, too. New or sustained business is a nice byproduct. The ultimate ‘win’ is making a difference for people.”

—Larry Friedman (former Executive Vice-President, Gallagher Benefit Services)

Fundamental Truth 9: Trust Is Strong and Durable, Not Fragile

It’s often said that trust takes a long time to build, but only a moment to destroy. This is something of a myth. The propensity to trust others is a character trait derived from our upbringings, and it changes very slowly. When people lose trust in other people or institutions, it is roughly at the same level and pace that trust was built. Where trust is lost quickly, it often wasn’t deep trust to begin with. And when we deeply trust people, we are slow and loath to give up on them.

Fundamental Truth 10: You Get What You Give

Trust is a relationship characterized by reciprocity. If Person A trusts Person B, the odds are that Person B will behave in a more trustworthy manner than if Person A is suspicious of her. Leaders who are willing to trust their followers produce more trustworthy teams. Followers who are willing to trust their leaders invite them to live by a more trustworthy standard.

In the realms of buyers and sellers, clients and professionals, bosses and subordinates, this reciprocal relationship is particularly clear. If you listen to others, they are more likely to listen to you. If you take a risk, you increase the odds of a risk being taken in return. If you share personal information, chances are your partner will share in kind. While it may sound like a New Age mantra of some kind, “you get what you give” is an accurate description of human nature—and of successful business relationships.

These 10 fundamental truths are embedded in this book. They foundationally describe how we have come to think about trust.

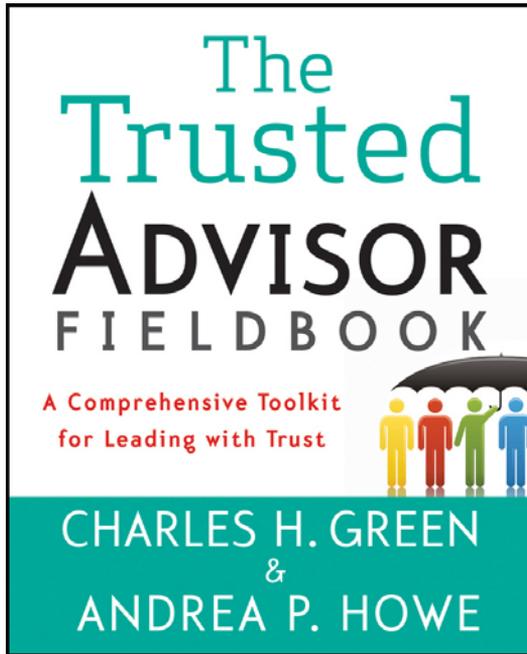
Worksheet: Your Truths about Trust

What's true for *you* about trust?

What trust maxims do you live by?

Which maxims serve you well? In what ways?

Which maxims are limiting? In what ways?



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