

Being a Trusted Advisor

Noblis LDP | February 25-27, 2014



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

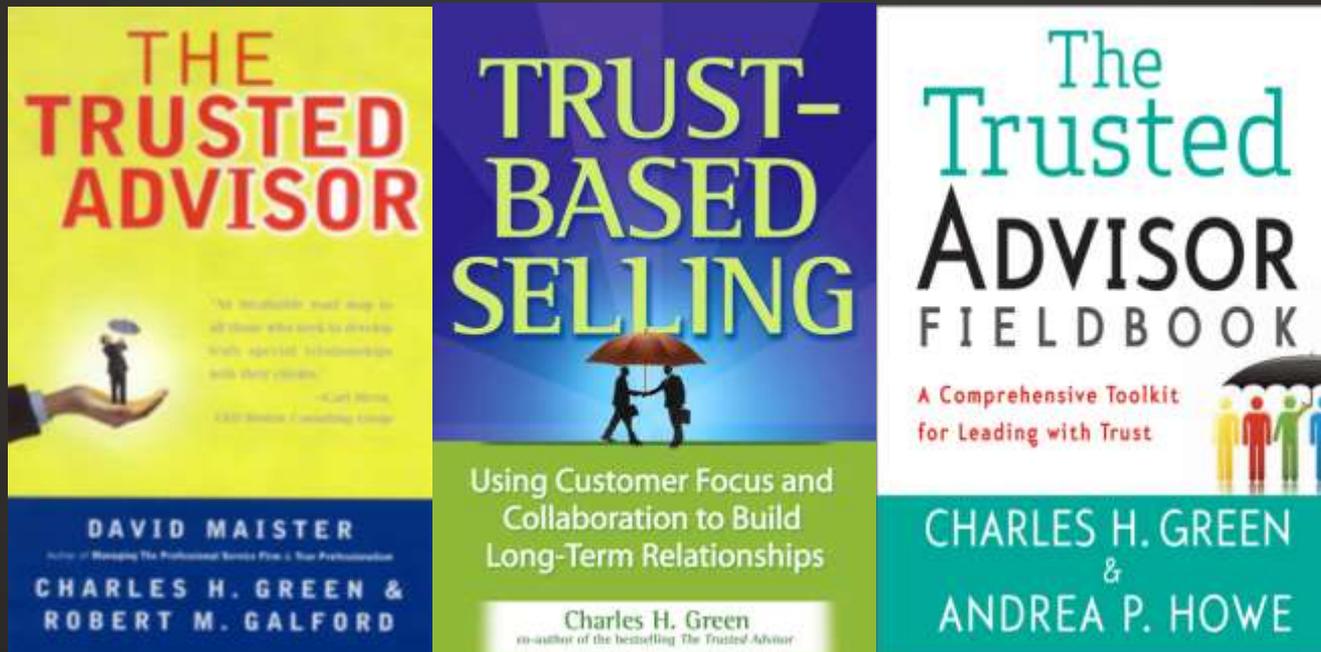
- A. Leave the room
- B. Answer both questions
- C. Share what I learned at school
- D. Redirect attention to the client

Trust is personal

1. Name
2. Role
3. How many months you have been with Noblis
4. 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?

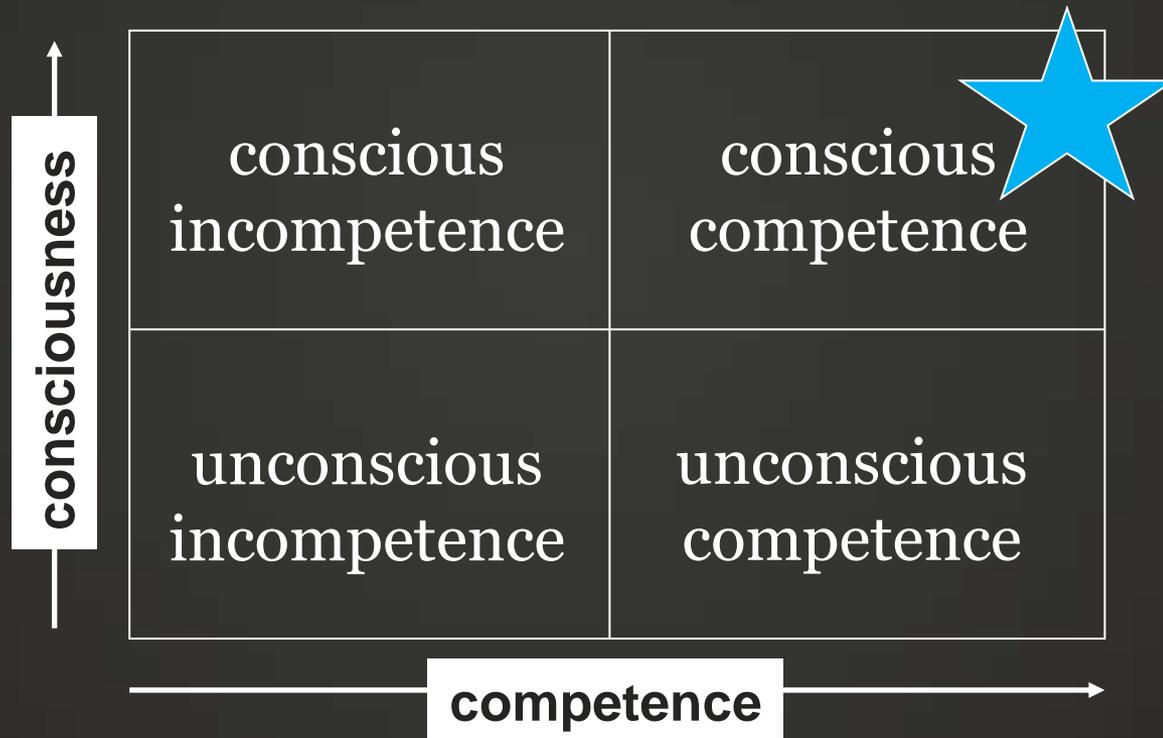
Work = enjoyable

Relationships = rewarding

Results = remarkable

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

“Mastery” is more than “really good”



We'll be covering a lot of ground

Day 1



Defining Trust



Making It Real

Day 2



Assessing
Trustworthiness



Being More
Influential



Managing Risk

Day 3



Managing Risk
(cont.)



Putting It
All Together

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

Remember your homework?

Bring to mind a “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



Let's make it real: 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

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Zip-Zap-Zop

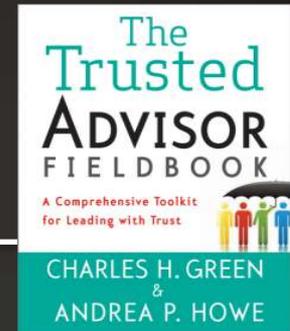
The Case of the Travel Agent

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

Ideal outcome?



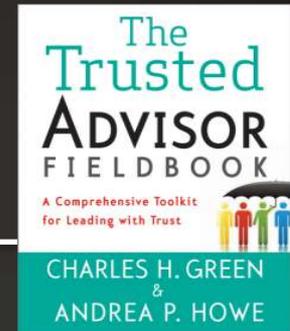
Let's make it real



Consider your **relationship challenge**.

What opportunities do you see to improve your
Intimacy and Self-orientation?

Let's make it real



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

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What's your TQ?

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Are **YOU** as Trustworthy as You Think?

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Helps improve your **credibility** in business

Gives you powerful tools to improve your **sales** results

Builds **deeper** and **more satisfying** personal relationships based on your new understanding of trust.

TRUSTED ADVISOR HAS BEEN FEATURED ON:



Are you **credible** like Margaret Thatcher?



Do you lack **reliability** like Albert Einstein?



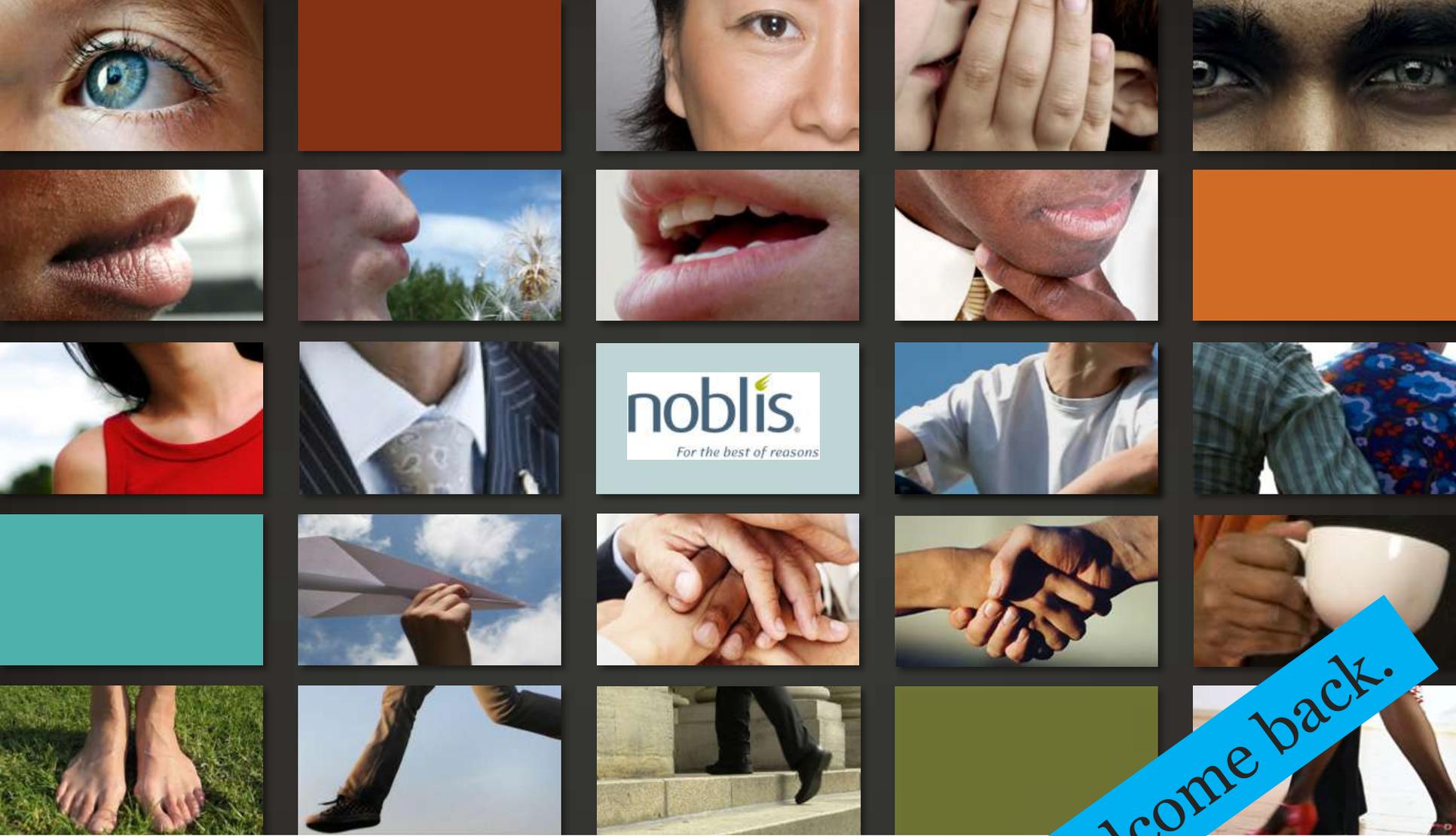
Are you **good at negotiating** like Bill Clinton?



Do you make people **feel safe** like Martin Luther King Jr.?



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Welcome back.

We're making progress

Day 1



Defining Trust



Making It Real

Day 2



Assessing Trustworthiness



Being More Influential



Managing Risk

Day 3

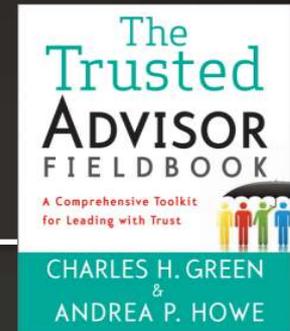


Managing Risk (cont.)



Putting It All Together

Let's make it real



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

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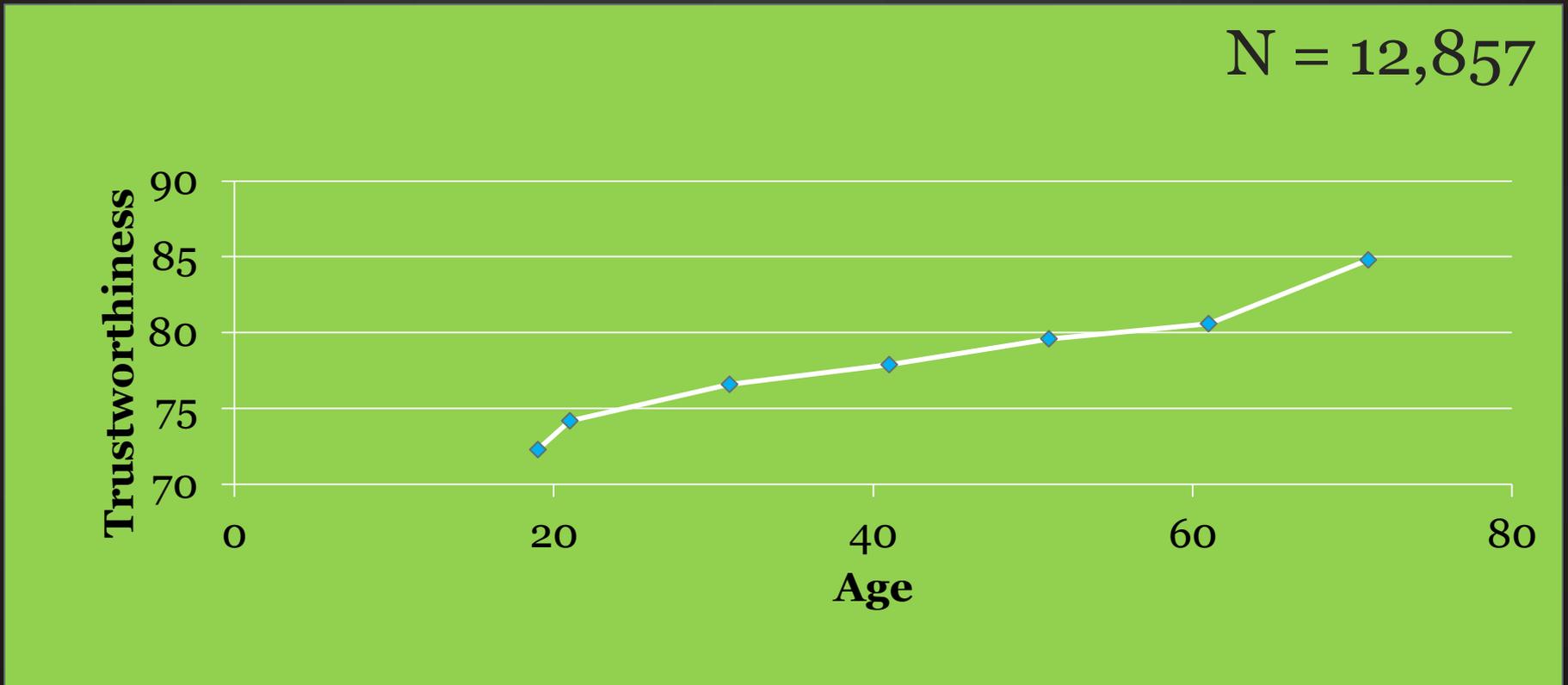


Assessing Trustworthiness

Who's more trustworthy: men or women?



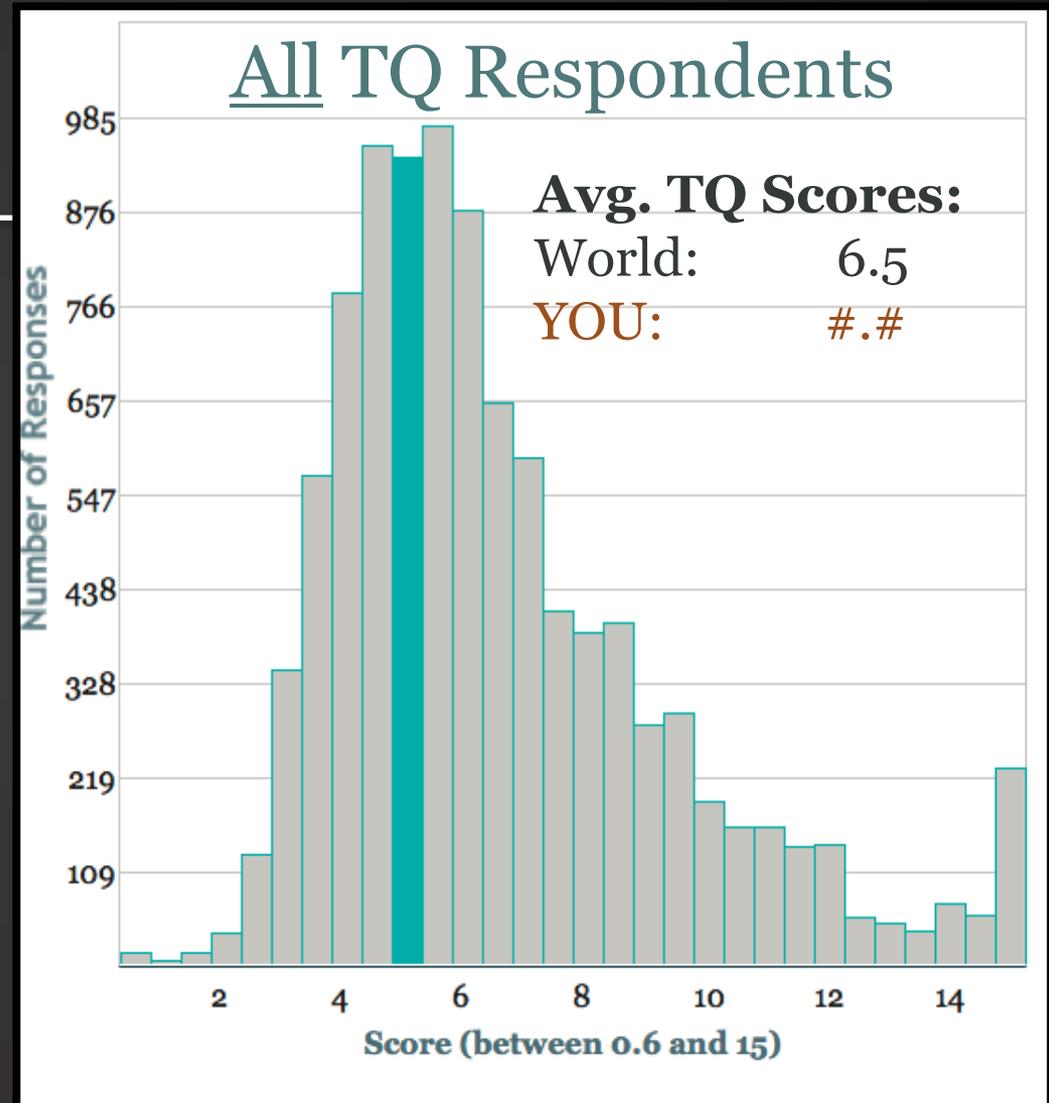
Do we get more or less trustworthy as we age?



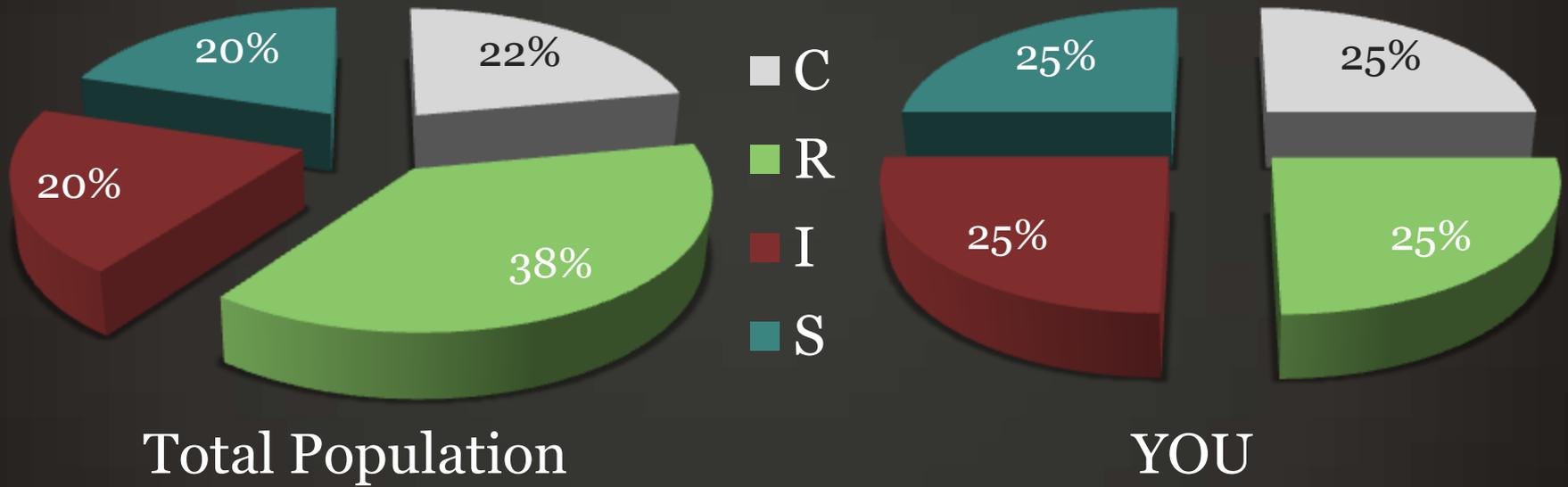
How trustworthy are *you*?

Note: Median
skewed left

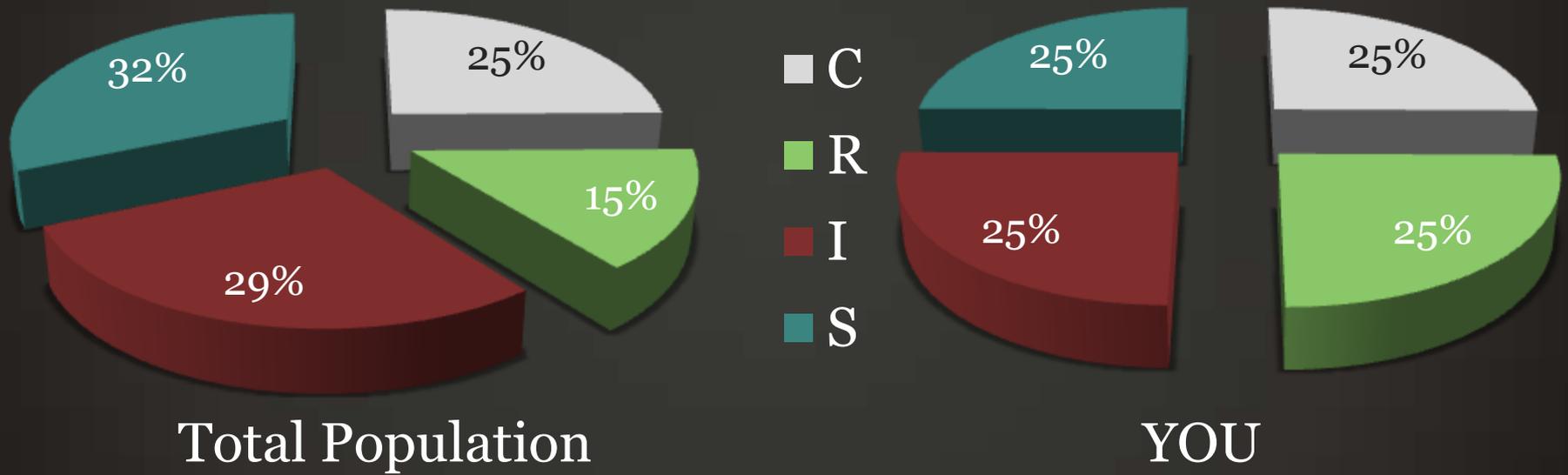
(3 x S)



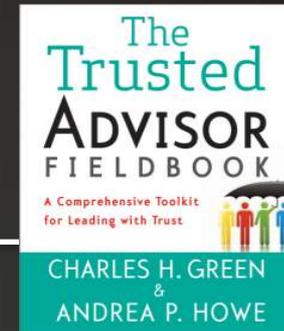
Here's how you see your strengths



Here's how you see your areas of opportunity



Let's make it real



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 situation?
4. What's one specific action you can take?

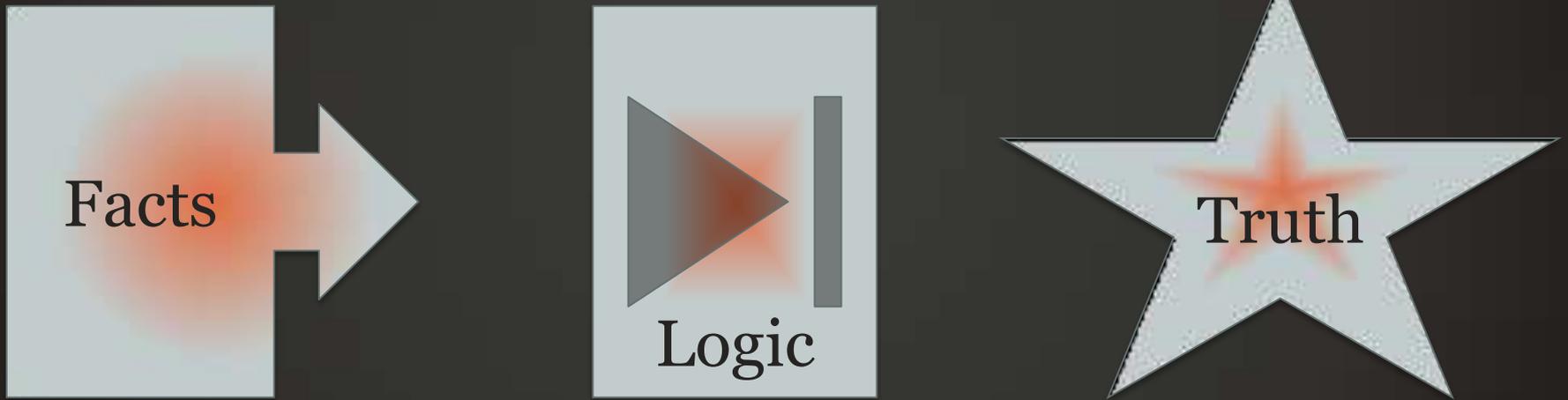
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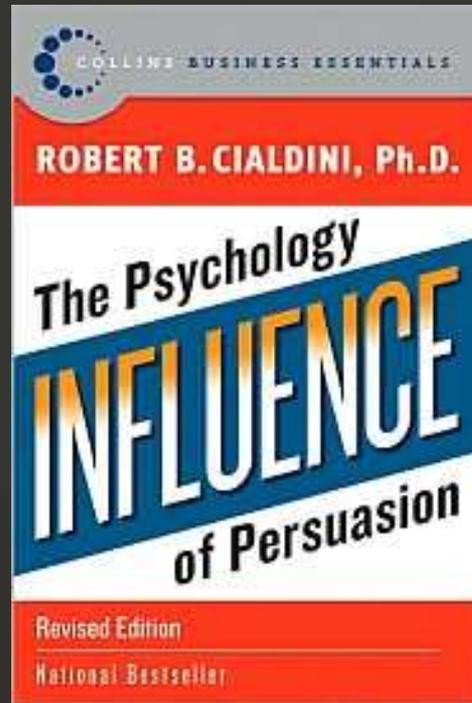
Being More Influential



Influence is as misunderstood as trust



What drives influence might surprise you

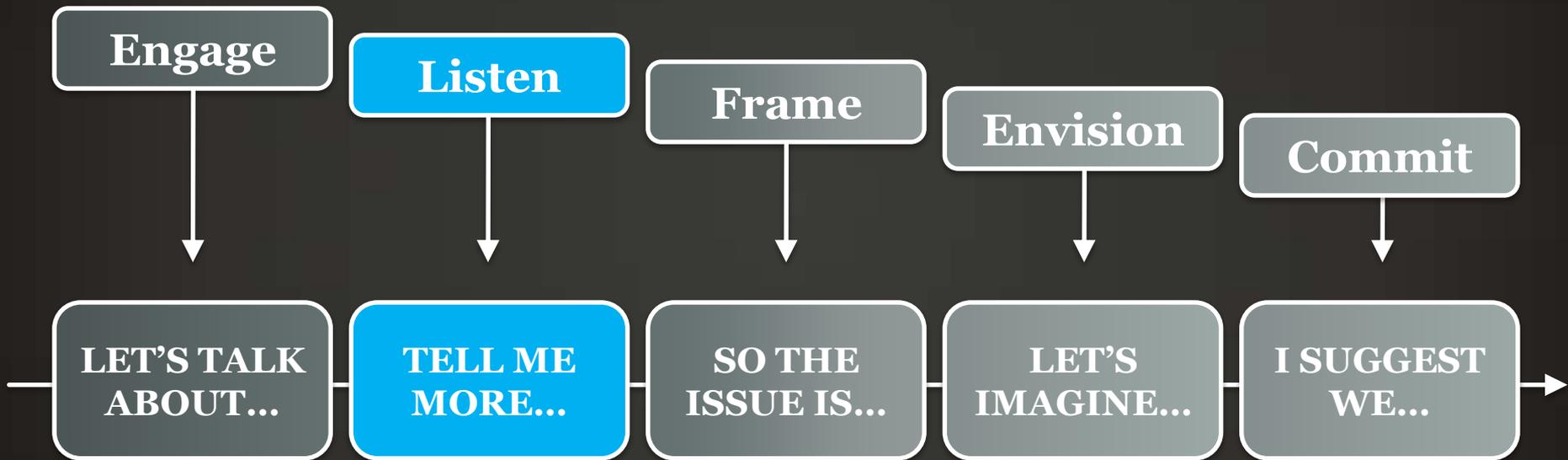


reciprocity

Trust breaks down in conversations in two key ways



Listening matters ... a lot



Influence, in fact, is a function of listening,
not talking



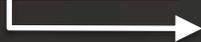
empathy

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*
- **Setup (1 minute)**

Describe your stakeholder's interests, concerns
- **Practice (4 minutes)**
 - 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*
- **Debrief (2 minutes)**
 - Observer—share specific strengths, opportunities
 - Stakeholder—share your experience

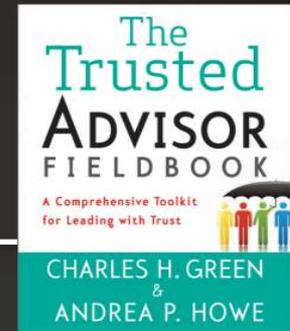
What did you discover?

- **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*?

What's in a Temperament?

Derived from the two strongest variables

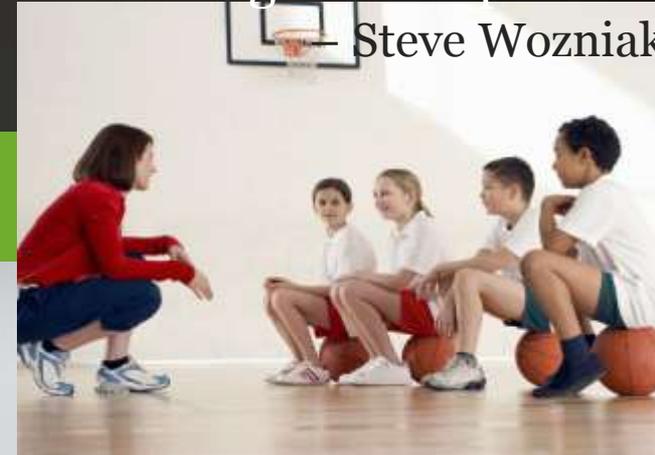
Your *innate preference* when it comes to building trust

Trust Temperament™	C	R	I	S
Expert	✓	✓		
Catalyst	✓		✓	
Professor	✓			✓
Doer		✓	✓	
Steward		✓		✓
Connector			✓	✓

Each Temperament brings a unique approach

“My goal wasn’t to make a ton of money.
It was to build good computers.”

Steve Wozniak



“Lead, follow or get out of the way.”

– Thomas Paine



“The important thing is not to stop questioning. Curiosity has its own reason for existing.”

– Albert Einstein



“I just did what I had to do as things came along.”

– Eleanor Roosevelt



“Invisible threads are the strongest ties.”

– Friedrich Nietzsche



“A genuine leader is not a searcher for consensus but a molder of consensus.”
– Martin Luther King, Jr.

Let's make it real

In groups by Trust Temperament™:

1. What do people appreciate about working with you?
2. What might frustrate them about working with you?
3. What would your ad/commercial/slogan/logo be?

Trust Temperament™	C	R	I	S
Expert	✓	✓		
Catalyst	✓		✓	
Professor	✓			✓
Doer		✓	✓	
Steward		✓		✓
Connector			✓	✓

What about effectiveness vs. distribution?

Temperament	TQ Score
RI Doer	80.6
IS Connector	80.4
CI Catalyst	79.9
RS Steward	79.7
CR Expert	79.1
CS Professor	79.1

What about effectiveness vs. distribution?

Temperament	TQ Score	World Dist.
RI Doer	80.6	17%
IS Connector	80.4	13%
CI Catalyst	79.9	10%
RS Steward	79.7	21%
CR Expert	79.1	31%
CS Professor	79.1	8%

What about your distribution?

Temperament	TQ Score	World Dist.	Your Dist.
RI Doer	80.6	17%	
IS Connector	80.4	13%	
CI Catalyst	79.9	10%	
RS Steward	79.7	21%	
CR Expert	79.1	31%	
CS Professor	79.1	8%	

Let's make it real

5. What have you discovered about your own Trust Temperament™?
6. What have you discovered about others' Trust Temperaments™?

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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.

Managing Risk



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 fewer)
2. Inventory all concerns, risks, fears (*yours*)
3. Use caveats to say them out loud

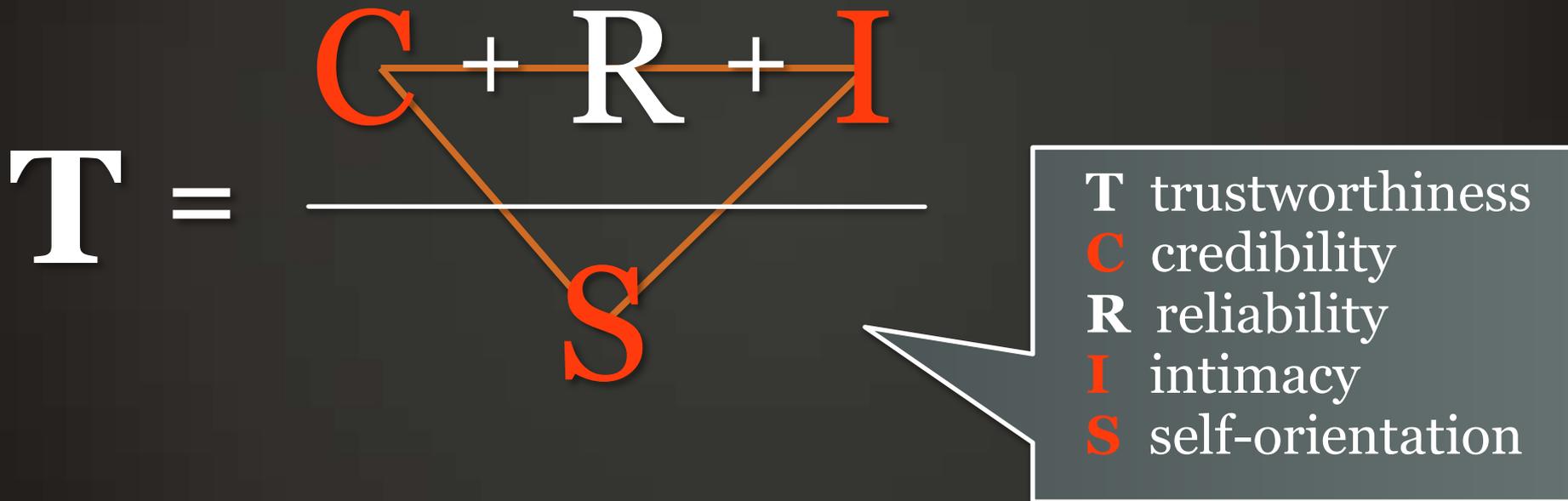
Caveats are conversational jewels

- “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

Ippiti-bippiti-bop

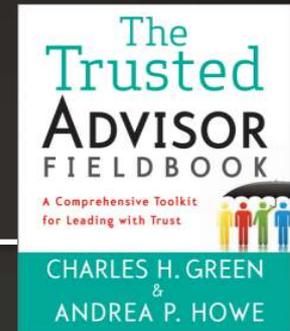
The Case of the Lunchroom

If you *were* to
Name It and
Claim It, what
would you say?

What caveats
would you use?



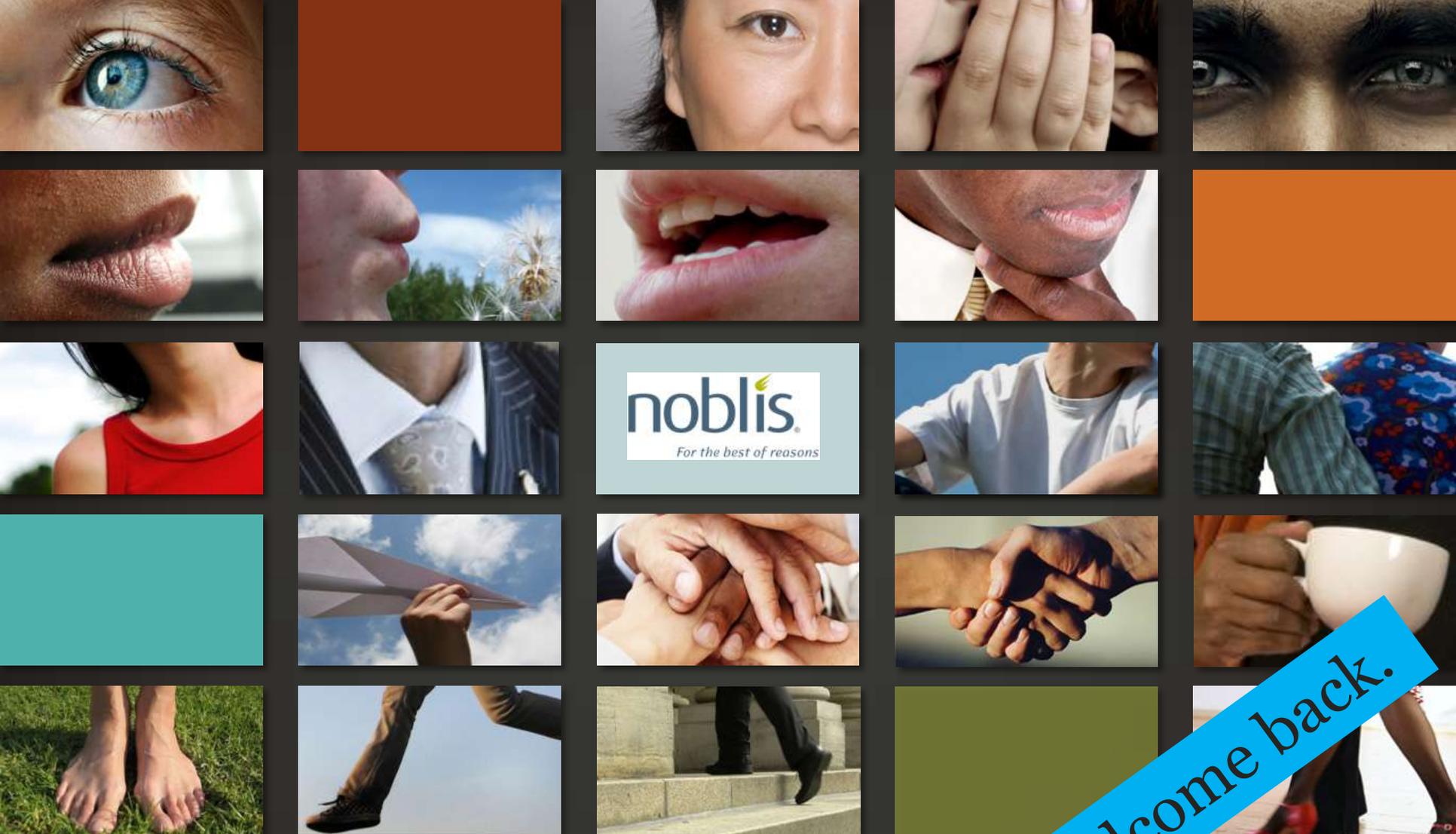
Let's make it real



Consider your **relationship challenge**.

What haven't you been saying that needs to be said?

How might you Name It and Claim It?



Welcome back.

Being a Trusted Advisor

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We've on the home stretch

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Making It Real

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Assessing Trustworthiness



Being More Influential



Managing Risk

Day 3

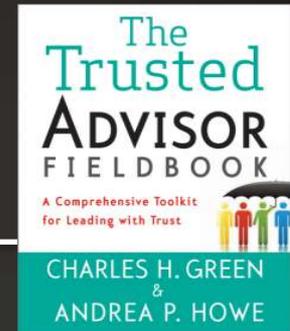


Managing Risk (cont.)



Putting It All Together

Let's make it real



What tools, practices, mindsets, maxims, and ways of being have you added to your trusted advisor toolkit?

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ELFEC: from good to great



Like death and taxes, problems are inevitable

The problem is _____.

Unfortunately, “my client is a jerk” is a terrible problem statement

- Subjective
- Unverifiable
- The object won't be inclined to agree



How you frame the issue is key

A good problem statement meets the following criteria:

- ✓ A rigorous statement of fact, devoid of blame
- ✓ Reflects a “we” approach—it has you in it
- ✓ Demonstrates a longer-term, relationship-based perspective
- ✓ Resonates emotionally as well as rationally
- ✓ Imputes good motives

Use these four steps to transform your problem statement

Version 1.0: The problem as authentically as you can state it

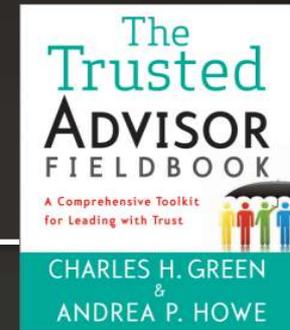
Version 1.1: Remove he/she/they

Version 1.2: Eliminate all forms of the verb “to be”

Version 1.3: Make sure your “we” includes both parties

Version 1.4: Imagine showing it to your stakeholder—will it resonate for her...and you?

Re-framing changes the conversation



Version 1.0:
Remove he/she/they

“He doesn’t get it, and he’s rude.”

Version 1.1:

Remove “to be”

“We can’t get his attention or his respect.”

Version 1.2:

Make “we” inclusive

“We can’t get his attention or his respect.”

Version 1.3:

Test for resonance

“We have very different approaches to communication.”

Version 1.4:

“We communicate differently, and that causes frustration.”

A young girl with dark hair, wearing large black-rimmed glasses, a purple and white striped bow tie, and a pink cardigan. She is looking directly at the camera with a neutral expression. The background is a light blue wall covered with numerous colorful sticky notes in shades of yellow, orange, pink, purple, and teal. The text 'Putting It All Together' is overlaid on the left side of the image.

Putting It All Together

“Yes, and ...”

There's something about Mary ...

What's your
minimum
acceptable
outcome?

Ideal outcome?



We've covered a lot of ground

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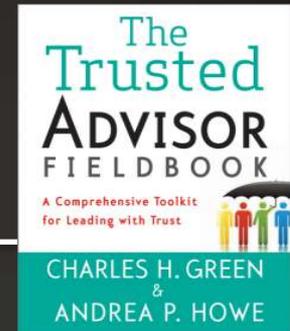


Managing Risk (cont.)



Putting It All Together

Let's make it real



What other tools, practices, mindsets, maxims, and ways of being have been added to your trusted advisor toolkit?

Five 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

1. Define your **30-day experiment**
2. Add **1 action** to take on your relationship challenge

Group call:
March 24
@
high noon ET

Let's make it real

#38



How will you choose ...

Andrea Howe
ahowe@trustedadvisor.com
1-202-906-0485
@AndreaPHowe, [LinkedIn](#)

... to set yourself apart?