Trust-Based Business Development

ENVIRON Immersion Program | June 2014

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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

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Trust is personal

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

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These are our building blocks

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What's the "so what" of trust?

Work = enjoyable

Relationships = rewarding

Results = remarkable

What are the natural results when you are trusted by your clients?

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“Mastery” is more than “really good”

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The immersion program is designed to help you be masterful

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We'll be covering a lot of ground in Part I

Day 1		Day 2	
Foundations for Success			Managing Risk
Assessing Trustworthiness			Putting it All Together
Being More Influential			Making it Real

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What do you really think about BD?

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Building trust
starts with being present

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Foundations for Success

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How would you answer the 6 toughest sales questions?

1. Why should we choose you?
2. What makes you different from your competitors?
3. How much experience have you had doing xyz in my business?
4. We don't need what you're selling right now, so why should we spend time with you?
5. We're happy with our present supplier, so why should we change?
6. Why are you so much more expensive?

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Olympic athletes know the value of mental prep

"Although mentally strong athletes do not always win medals due to a variety of conditions, athletes with a weak 'mental game' virtually never win at the biggest competitions."

From the U.S. Olympic Committee's Top Ten Guiding Principles for Mental Training, as reported in *Foundations of Sport and Exercise Psychology With Web Study Guide-5th Edition* by Robert Weinberg and Daniel Gould

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Mindsets make a difference

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Trust-based selling is about helping

"The objective of trust-based selling is to help the buyer do the right thing—for the buyer. Period."

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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

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Trust-based relationships are distinctive

	Focus:	Energy:	Output:	Success:
Expertise-based	Answers, expertise	Explaining	Information	Timely, high quality
Needs-based	Business problem	Problem-solving	Solutions	Problems resolved
Relationship-based	Partner org'n	Providing insights	Ideas	Repeat business, sole-sourced
Trust-based	Partner as a person	Under-standing partner	**Safe haven for tough issues**	Mutually rewarding relationship

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Remember your homework?

Bring to mind a "client opportunity/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

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Let's make it real

Looking at your **client opportunity/ challenge**, where are you spending most of your time?

	Focus:	Energy:	Output:	Success:
Expertise-based	Answers, expertise	Explaining	Information	Timely, high quality
Needs-based	Business problem	Problem-solving	Solutions	Problems resolved
Relationship-based	Partner org'n	Providing insights	Ideas	Repeat business, sole-sourced
Trust-based	Partner as a person	Under-standing partner	**Safe haven for tough issues**	Mutually rewarding relationship

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Who's *your* Trusted Advisor?

Bring to mind someone in your life you would turn to for advice on a wide range of topics, including sensitive ones both professional and personal.

What words would you use to describe this person?

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Looking up “trust” is a waste of time

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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

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Reliability is about actions

Actions

Reliability

Dependability
Predictability

I trust him to…

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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

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Credibility relates to words

Words	Actions
Credibility	Reliability
Truthfulness Credentials *I trust what she says about…*	Dependability Predictability *I trust him to…*

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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

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Intimacy relates to safety

Words	Actions	Safety
Credibility	Reliability	Intimacy
Truthfulness Credentials *I trust what she says about…*	Dependability Predictability *I trust him to…*	Discretion Empathy Risk-taking *I trust her with…*

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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

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Self-orientation relates to focus

Words	Actions	Safety	Focus
Credibility	Reliability	Intimacy	Self-Orientation
Truthfulness Credentials *I trust what she says about…*	Dependability Predictability *I trust him to…*	Discretion Empathy Risk-taking *I trust her with…*	Motives Attention *I trust that he cares about…*

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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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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

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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 **client opportunity/challenge**.

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

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Assessing Trustworthiness

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Who's more trustworthy: men or women?

N = 12,857

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Do we get more or less trustworthy as we age?

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How trustworthy are *you*?

Note: Median skewed left

(3 x S)

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Here's how you see your strengths

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Here's how you see your areas of opportunity

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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?

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

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

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Being More Influential

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Influence is as misunderstood as trust

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What drives influence might surprise you

reciprocity

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Trust breaks down in conversations in two key ways

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Not listening has big consequences

"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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Listening matters … a lot

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

empathy

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You have to earn the right to be right

RATIONAL

Paraphrase

NON-RATIONAL

Empathize

Earn the Right

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The good news: masterful listening can be learned

	Round 1	Round 2	Round 3
Client	A	B	C
Listener	B	C	A
Observer	C	A	B

- Groups of 3 in 3 rounds
  - *Your own client*
  - *Listener*
  - *Observer*
- 1-minute setup:
  Describe your client's interests, concerns
- 4-minute role-play
  - Client—*be that client; 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

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What did you discover?

- Listener—What was hardest about doing this?
- Observer—What did the listener do well? What were the opportunities for improvement?
- Client—What was your experience?

What "ahas" did you have as your client?

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Let's make it real

Consider your **client opportunity/challenge**.

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

What might you *listen for*?

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Trust-Based Business Development

ENVIRON Immersion Program | June 2014

Let's make it real

What tools, practices, mindsets, maxims, and ways of being are in your trust-based business development toolkit so far?

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We're making progress

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Let's talk more about your learning team

Learning Team Meetings

Jul - Aug

SETUP:
Teams of 5-6

GOAL:
Support and accountability for walking the talk

COMMITMENT:
Three meetings (#2 is coached); 45 minutes each
Box updates before and after
Follow-through on actions planned

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Meet your learning team coach, Stewart Hirsch

Learning Team Meetings

Jul - Aug

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You're part of a program, not an event

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Let's look briefly at ENVIRON's BD process

- What helps?
- What hinders?
- What do you wish for?

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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			✔	✔

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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

"A genuine leader is not a searcher for consensus but a molder of consensus."
- Martin Luther King, Jr.

"Invisible threads are the strongest ties."
– Friedrich Nietzsche

Let's make it real

In groups by Trust Temperament™:

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

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

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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

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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%

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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%	

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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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Your learning team, continued

Jul - Aug

Discuss:

- ❑ Your Trust Temperaments™
- ❑ Governance (facilitator(s), other roles)
- ❑ Team name
- ❑ Date and time for first meeting

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Managing Risk

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What tough messages do you have to deliver?

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

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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 …"

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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."

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Saying the hard stuff can be a trust trifecta

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

T trustworthiness
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R reliability
I intimacy
S self-orientation

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The Case of the Lunchroom

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

What caveats would you use?

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Let's make it real

Consider your **client opportunity/challenge**.

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

How might you Name It and Claim It?

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Putting It All Together

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ELFEC: from good to great

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Let's revisit the 6 toughest sales questions

1. Why should we choose you?
2. What makes you different from your competitors?
3. How much experience have you had doing xyz in my business?
4. We don't need what you're selling right now, so why should we spend time with you?
5. We're happy with our present supplier, so why should we change?
6. Why are you so much more expensive?

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We've covered a lot of ground

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Let's make it real

What tools, practices, mindsets, maxims, and ways of being have you added to your trust-based business development toolkit?

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There's one more tool in your toolkit

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?

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Let's talk next steps

What **one action** could you take to cause a breakthrough with your client opportunity/challenge?

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You're "ambassadors" now

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How will you choose …

… to set yourself apart?

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