

What do you think about sales?

1. The objective of selling is to_____.
2. Words that come to mind immediately when I think of selling are_____.
1. When it comes to selling, I wish_____.
2. If only sales didn't have to be_____.
3. Fundamentally, selling requires_____.



Trust-Based Selling Workshop Series



gilman partners
The right people. The right fit.

Session 1:
February 22, 2017

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



- A. Wait for Chuck to respond
- B. Press on
- C. Back out gracefully
- D. Get curious

Trust is personal

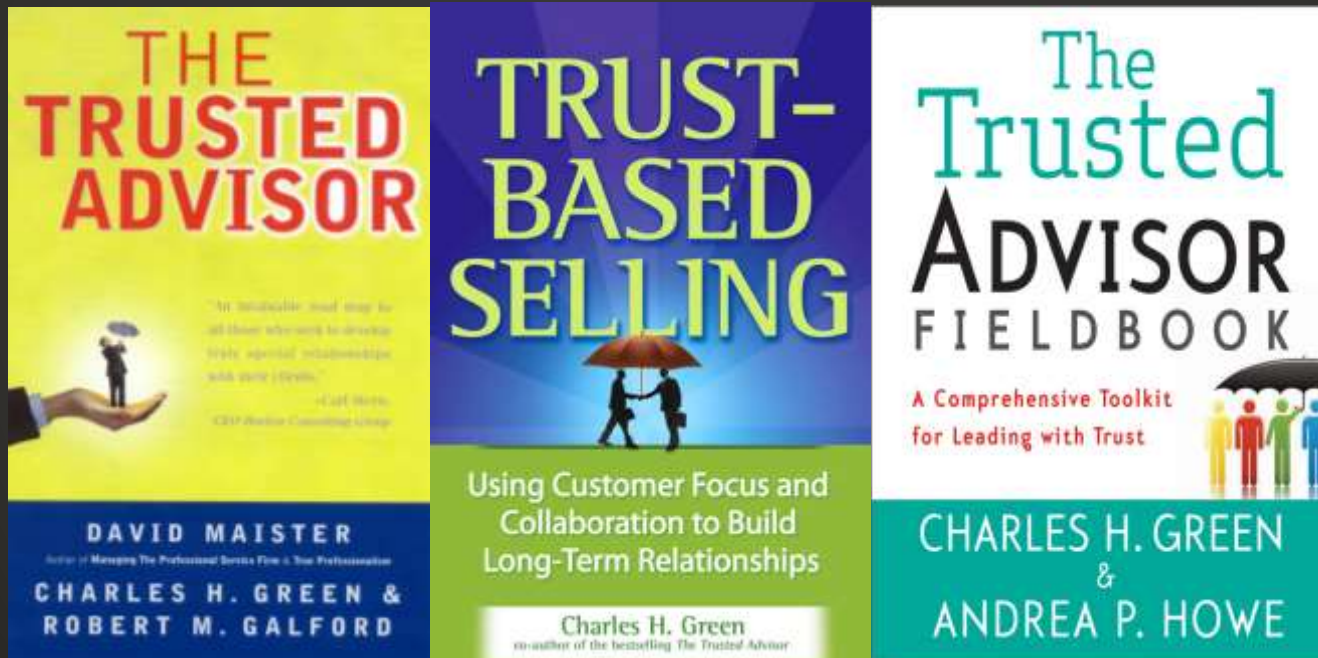
1. Name
2. Role

3. Number of
months at
Gilman
Partners

4. An interesting
tidbit or factoid
that *no one in the
room yet knows**

*And you wouldn't mind if
everyone in the room knew

These are our building blocks



What's the “so what” of trust?

p. 6

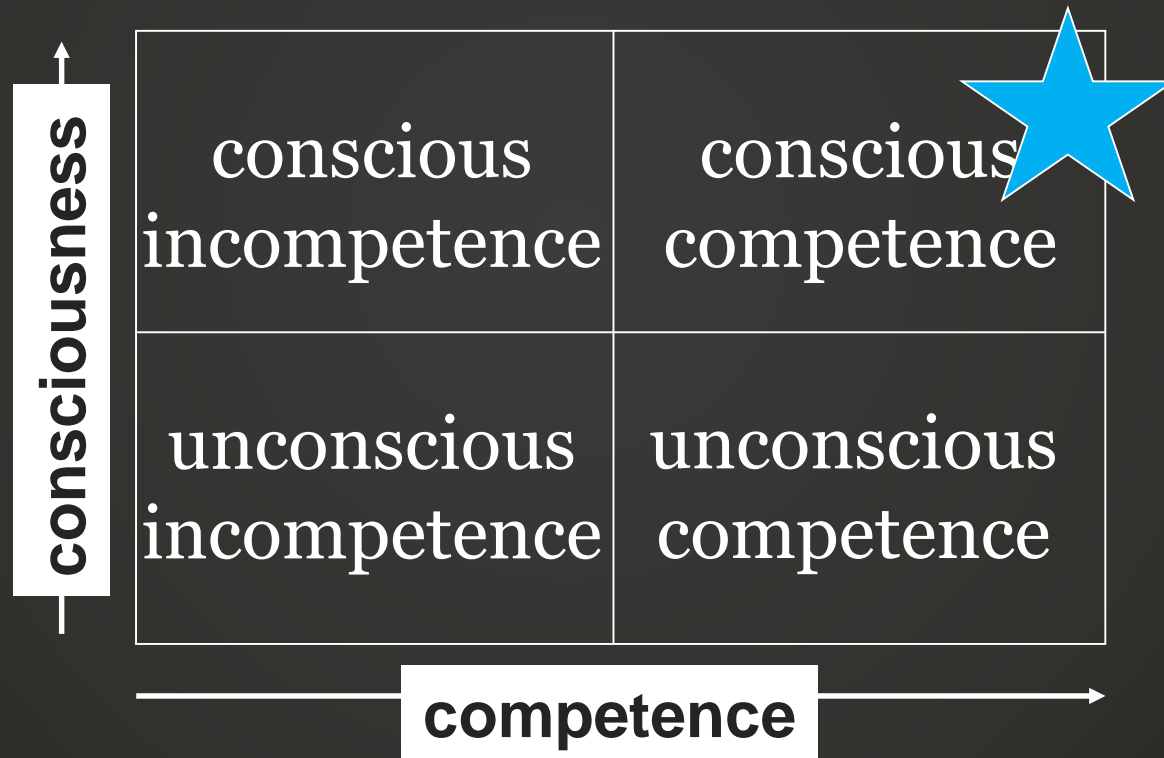
Work = enjoyable

Relationships = rewarding

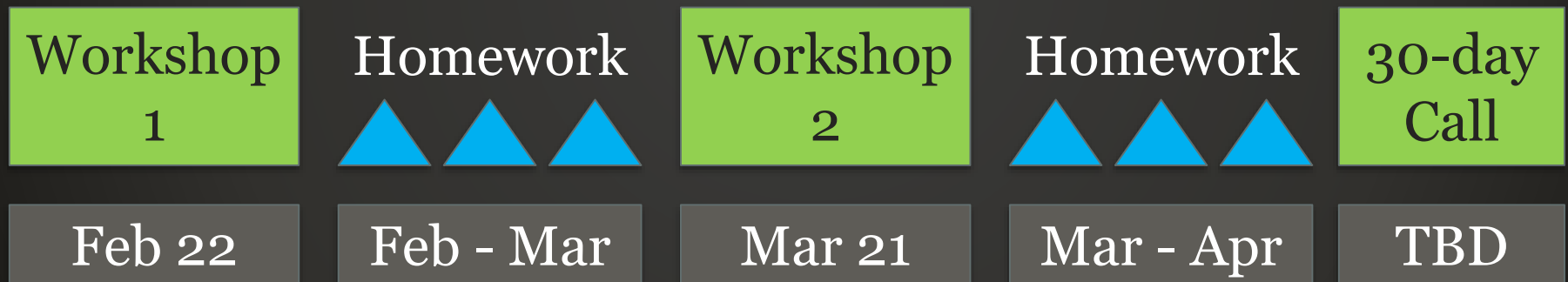
Results = remarkable

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

“Mastery” is more than “really good”



The workshop series is designed to help you be masterful



We'll be covering a lot of ground in Workshop 1

Workshop 1

Foundations for
Success



Buyer
Psychology



Making it
Real



Assessing
Trustworthiness



Being More
Influential

Building trust starts with being present



Foundations for Success



Olympic athletes know the value of mental prep

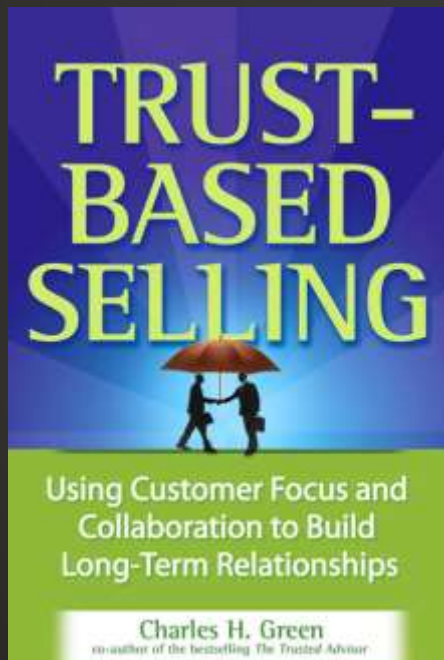
“Although mentally strong athletes do not always win medals due to a variety of conditions, athletes with a weak ‘mental game’ virtually never win at the biggest competitions.”

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

Mindsets make a difference



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.”

Remember your homework?

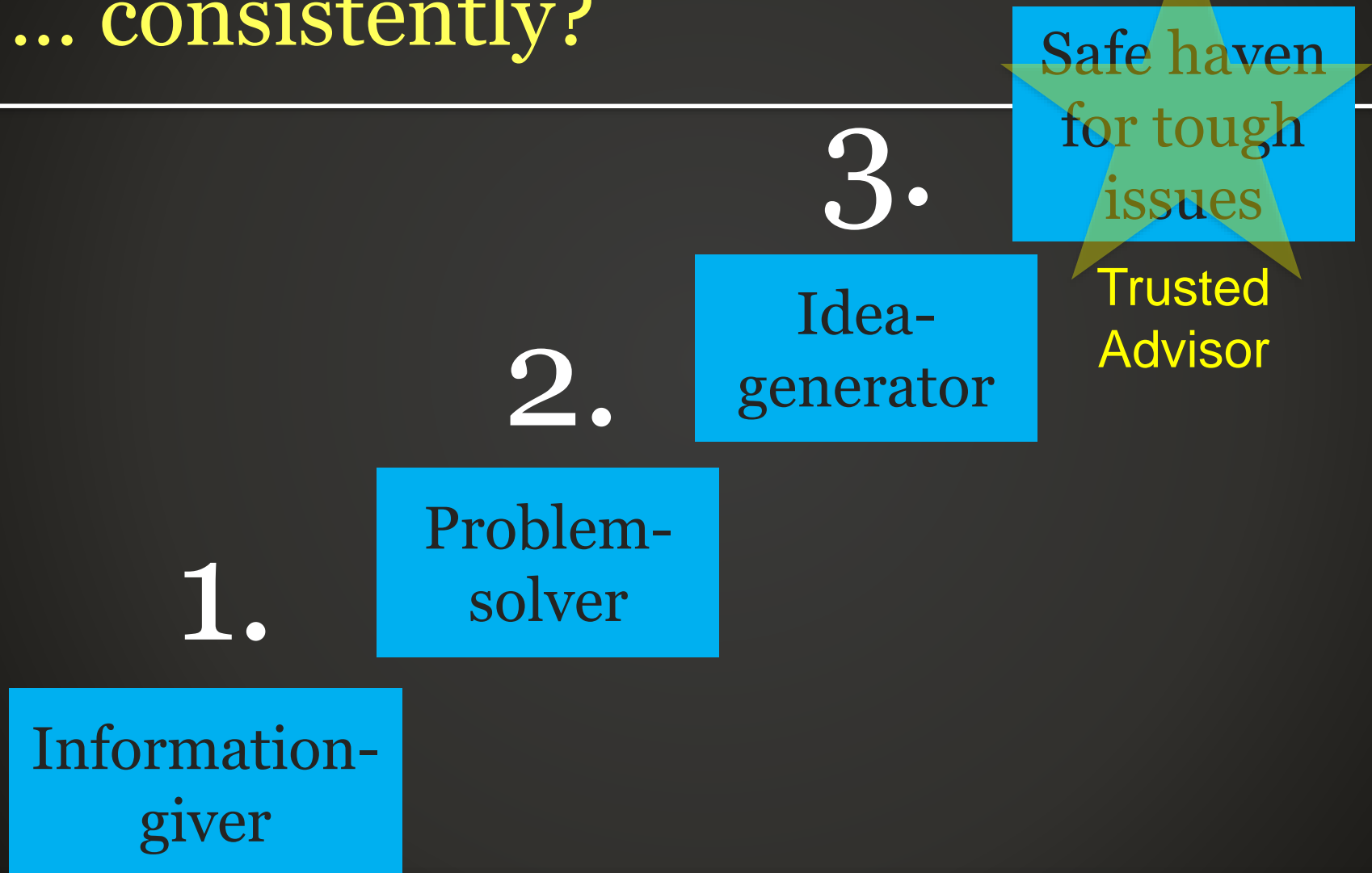
Identify a “client opportunity/challenge”:

1. It's a new relationship, a new opportunity ... or there's misalignment, concern, frustration (big or little)
2. It's current
3. It's with an individual
4. You can speak about it here

Make it real: Say three things out loud

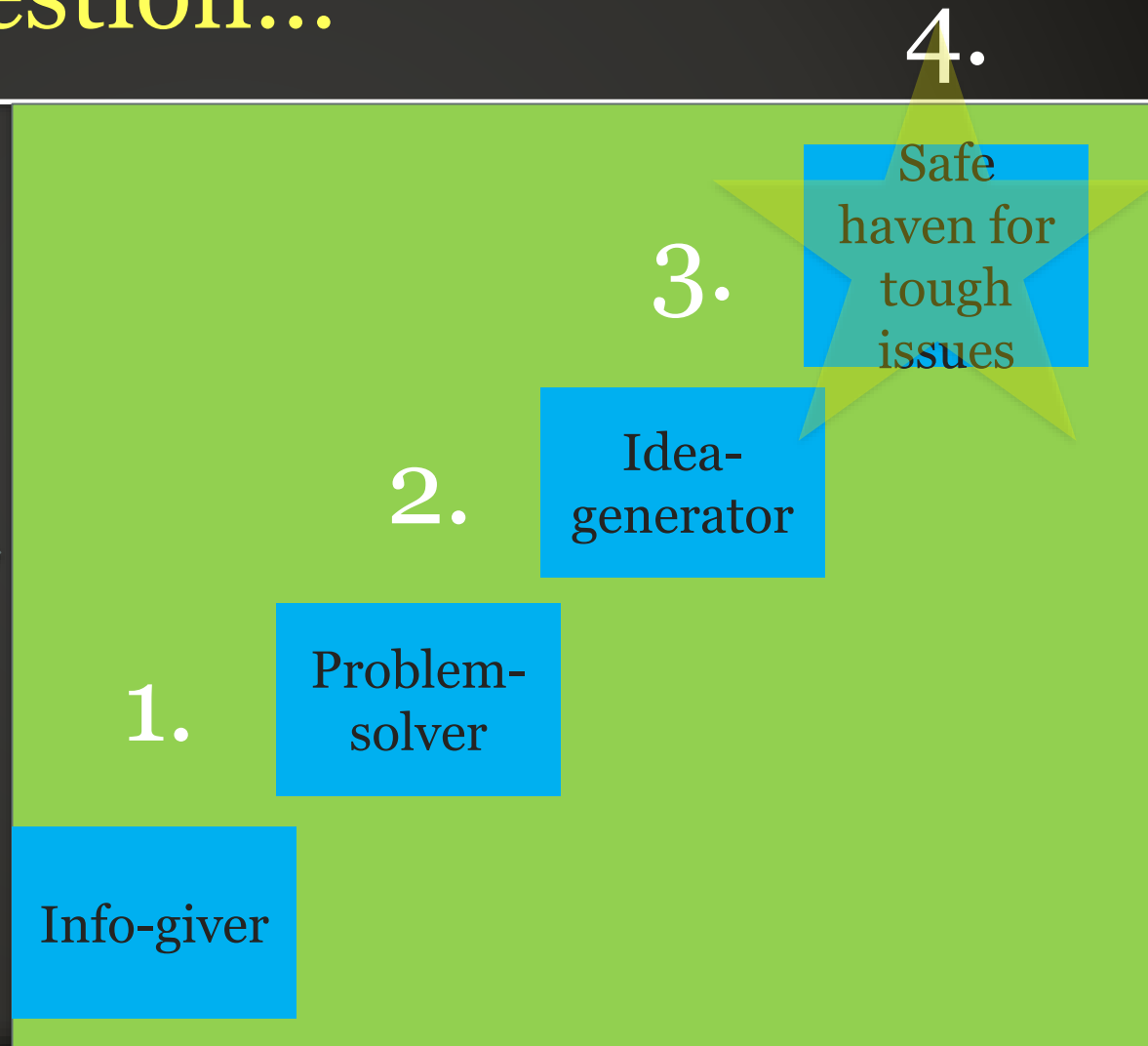
1. “My client’s name is _____.”
2. “The opp’y/challenge as I see it is _____.”
3. “My wish/ideal>truest desire for this relationship is _____.”

At what level are you playing ... consistently?



Make it real: One more question...

“With my client opportunity/challenge, I spend most of my time at Level ____.”



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?

Looking up “trust” is a waste of time



The Trust Equation brings clarity to ambiguity

p. 10

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

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

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

Make it real: What will you do?

p. 12
p. 36

Consider your **client opportunity / situation.**

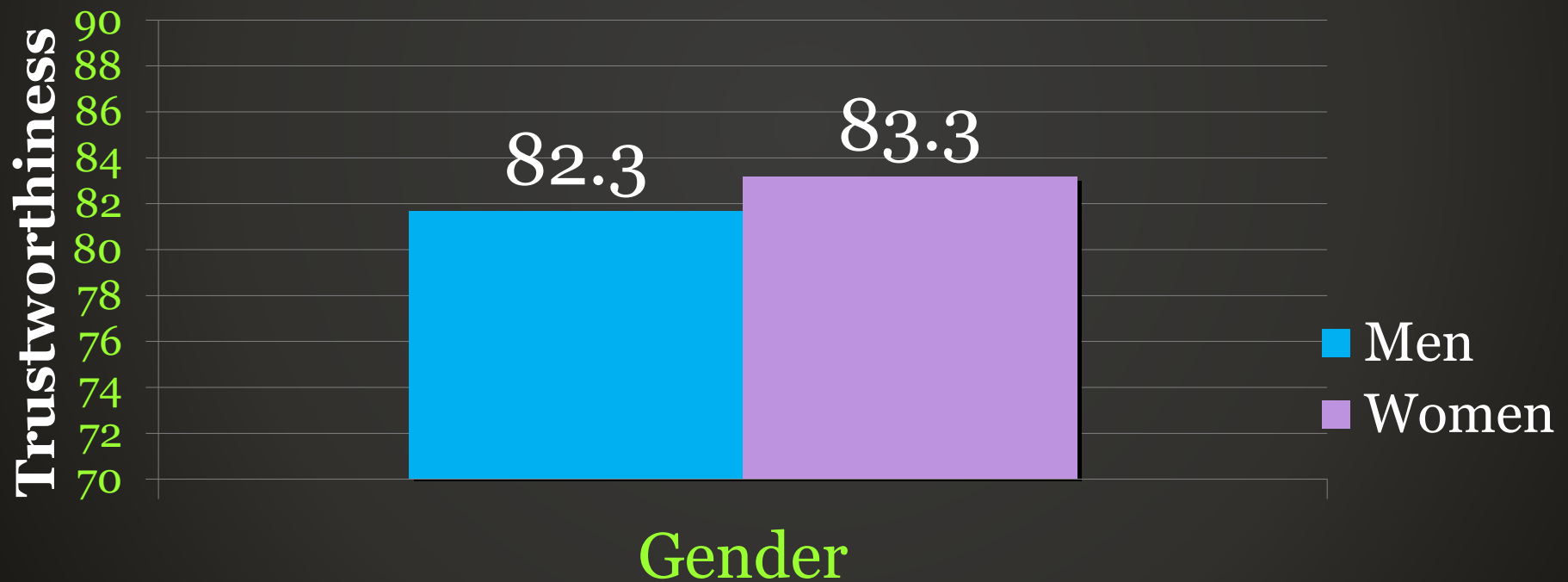
How would your client rate you using the Trust Equation?



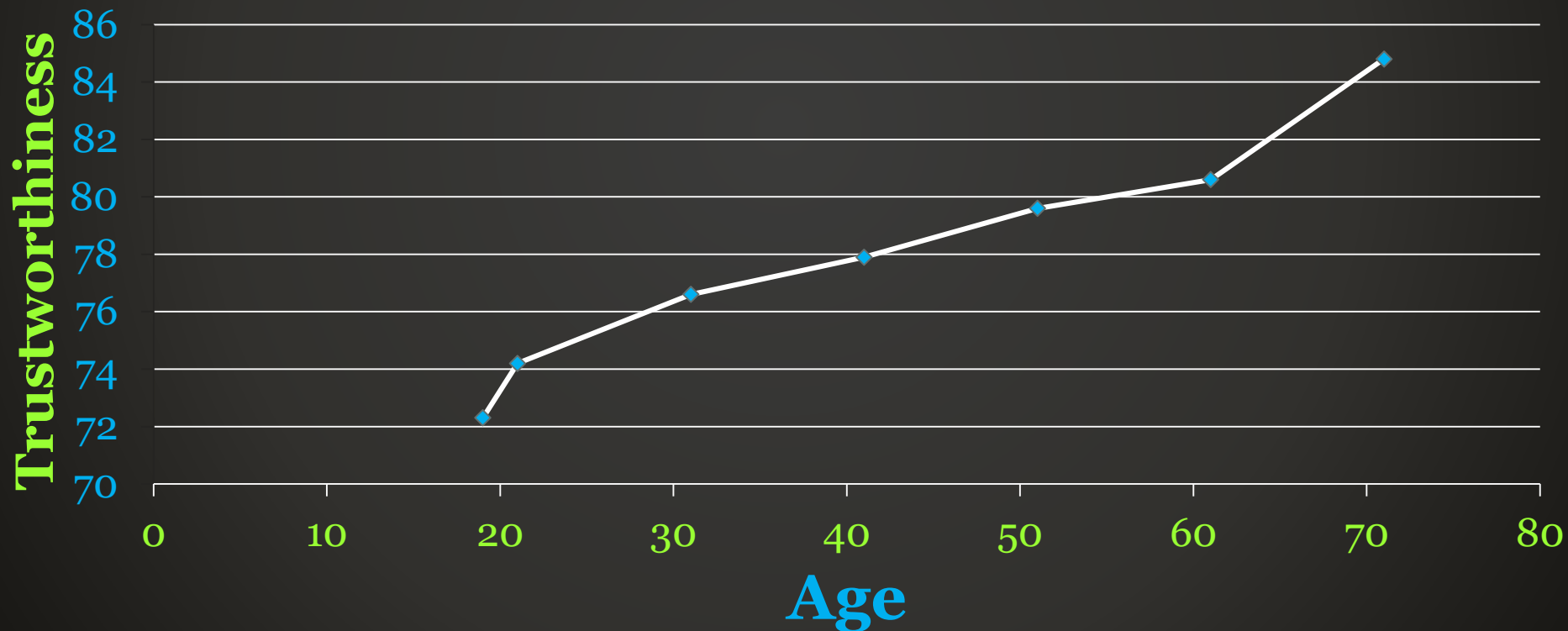


Assessing Trustworthiness

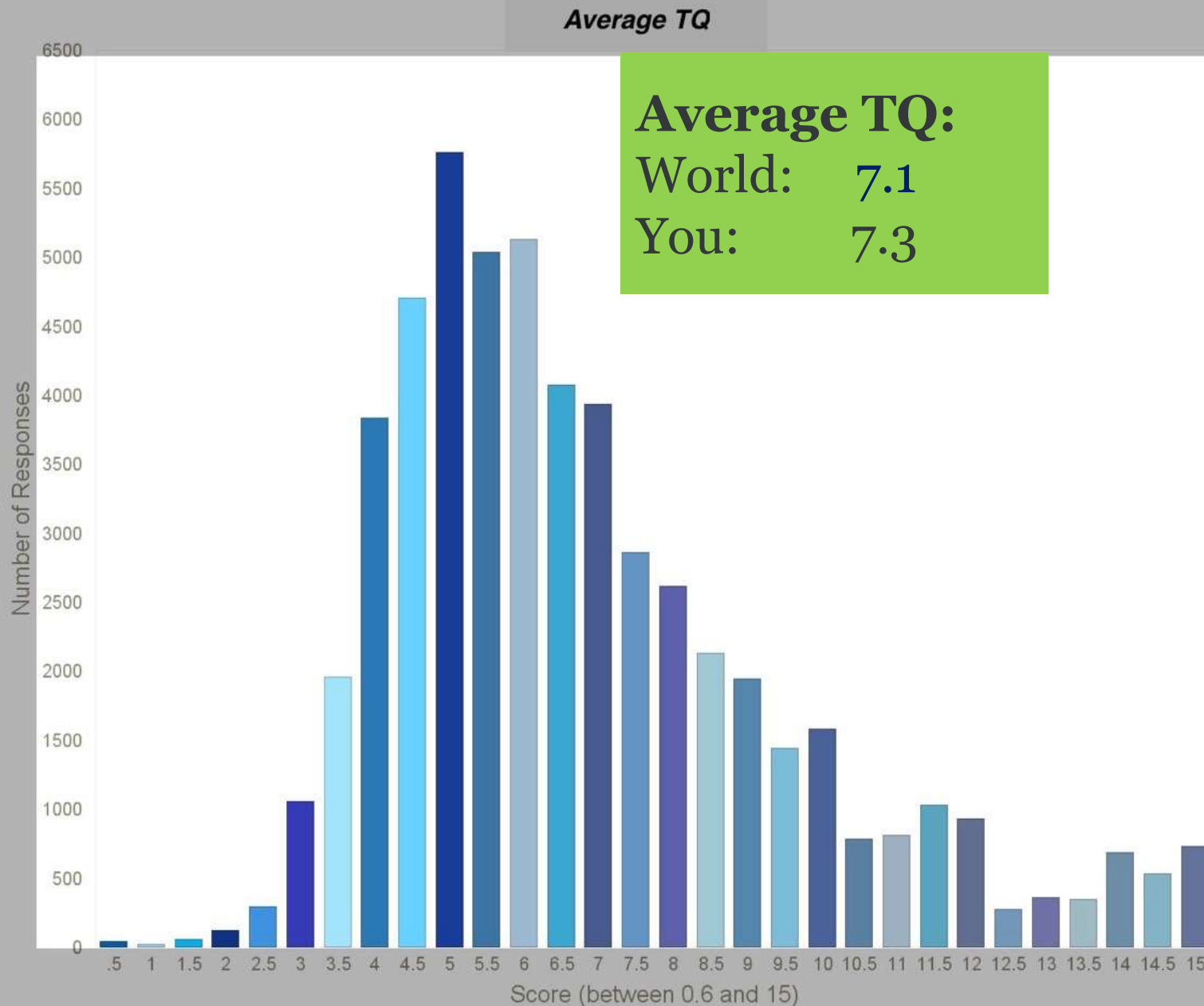
Who's more trustworthy: men or women?



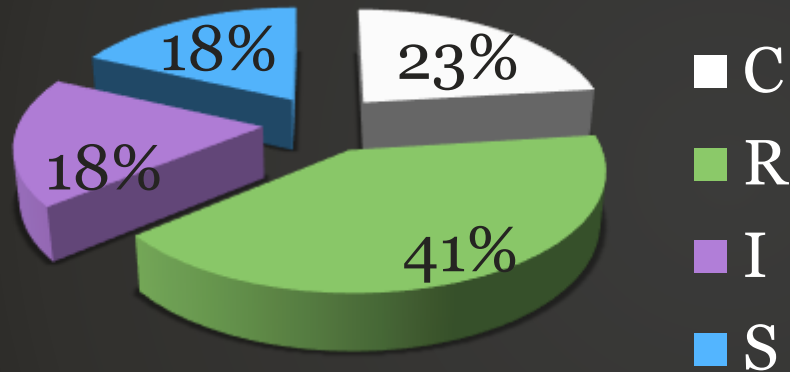
Do we get more or less trustworthy as we age?



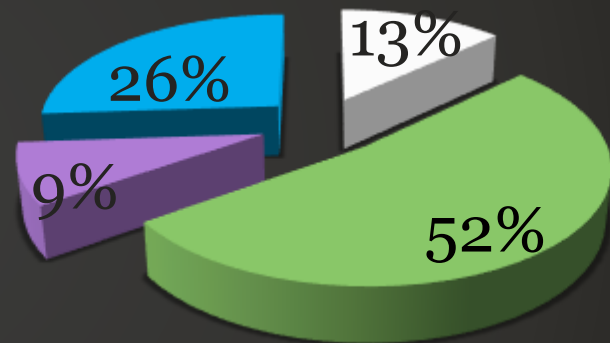
How trustworthy are *you*?



Here's how you see your strengths

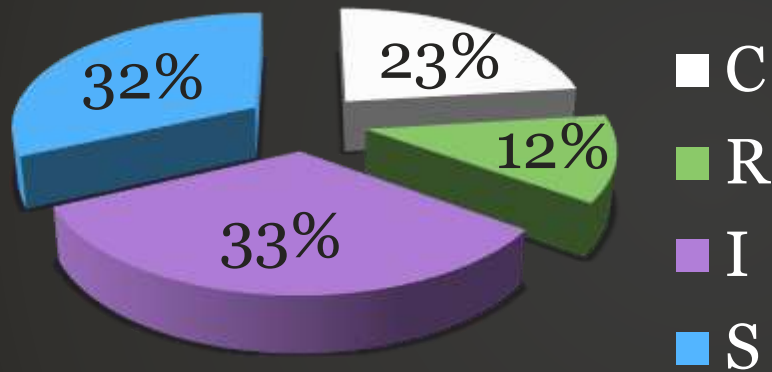


Total Population

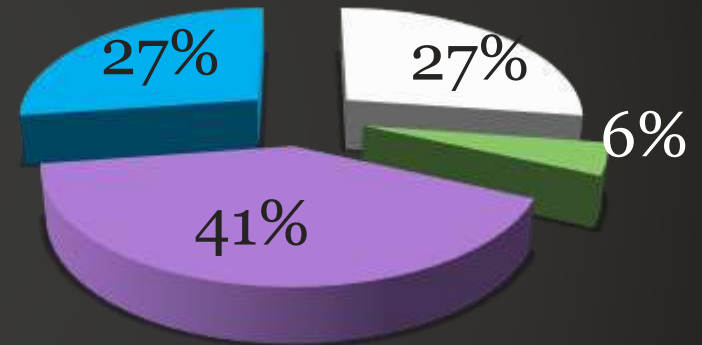


Gilman Partners
N = 16

And how you see your areas of opportunity



Total Population



Gilman Partners
N = 16

Make it real: Your TQ

p. 13

pp. 14-15

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

Make it real: Insights on your own Trustworthiness

Consider your **TQ**
results.

What are you noticing
about your own
trustworthiness? Share
insights with at least 3
people over lunch.



Try a 30-day experiment

pp. 32-33

“We are
what we
repeatedly
do.
Excellence,
then, is not
an act, but
a habit”

—Aristotle

Goal:

Develop a new habit in an
area of trustworthiness
where you have the most
room to improve.

The Travel Agent Case

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

Ideal outcome?

p. 16



Make it real: Intimacy and Self-Orientation

p. 17

Consider your **client opportunity / situation.**

What opportunities do you see to improve your intimacy and self-orientation?



Buyer Psychology



Clients buy in two distinct phases

p. 19



Most people in professional services approach these phases the same way

The Case of the Law Firm

What
stands
out?



Professional services are a lot like perfume and fine wine



Why does
“selling by
doing”
accelerate
trust-
building?

Your turn

Two lists:

1. In what ways do you effectively sell by doing now?
2. How might you do more selling by doing, or do it more effectively? (min. 3 ideas)



Make it real: What will you do?

Consider your **client opportunity / situation.**

Identify ways you could do more *Selling by Doing* with your client.

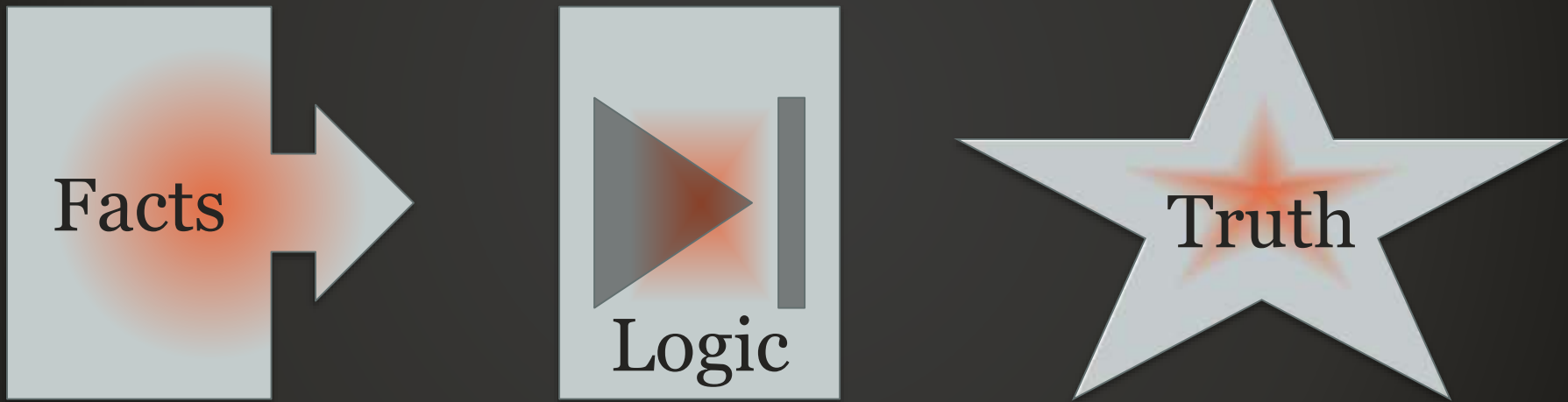


Being More Influential

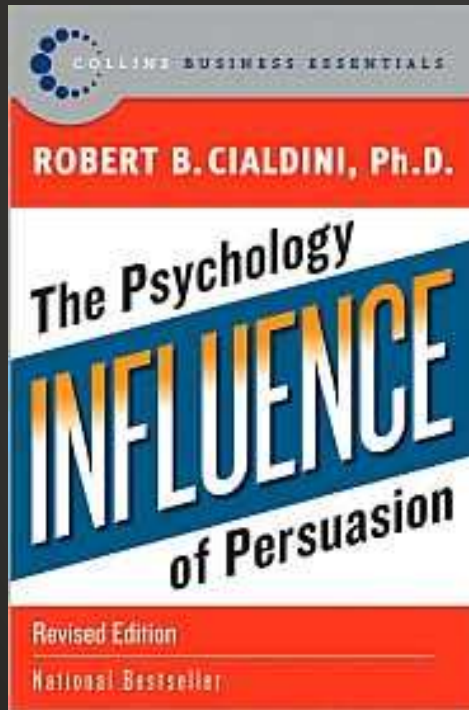


Influence is as misunderstood as trust

p. 23



What drives influence might surprise you



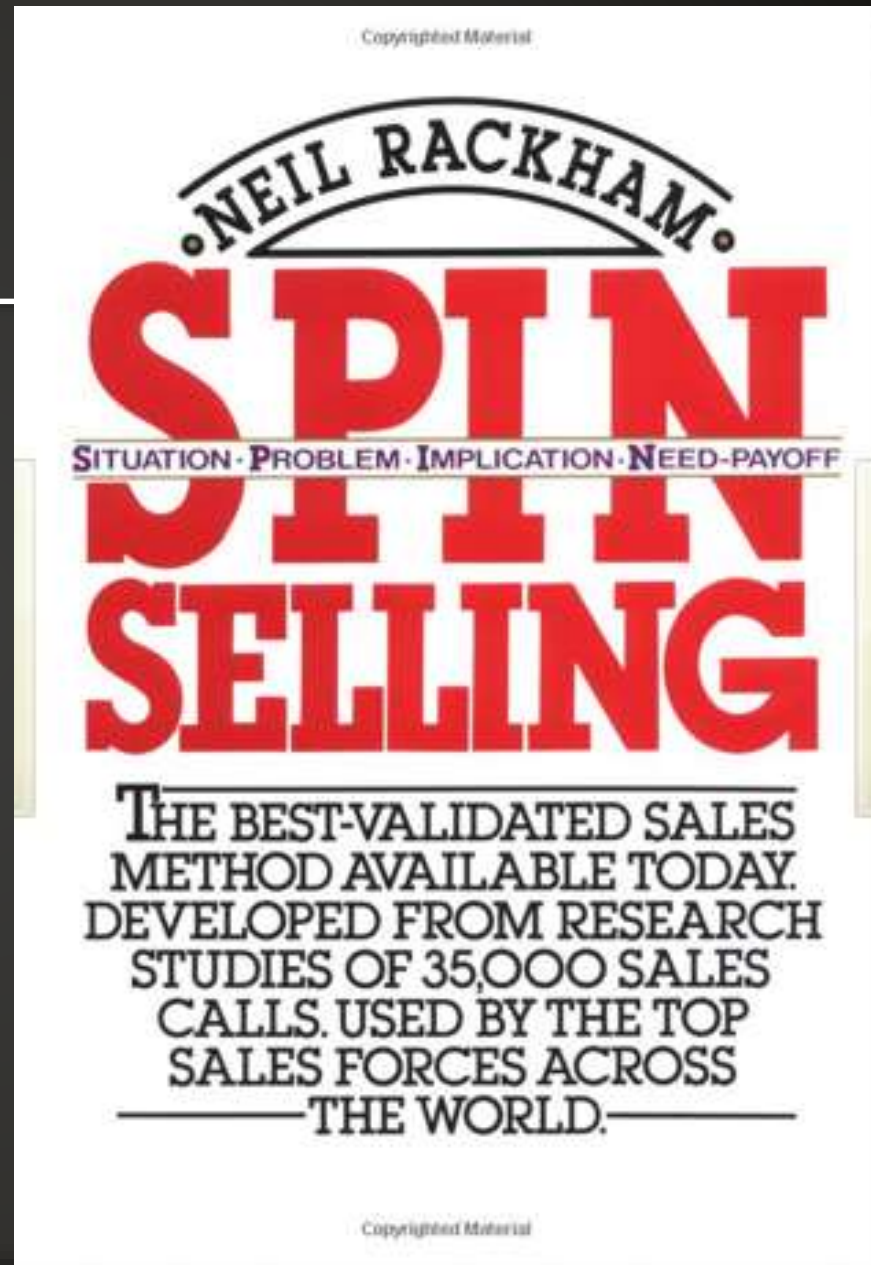
reciprocity

Trust breaks down in conversations in two key ways



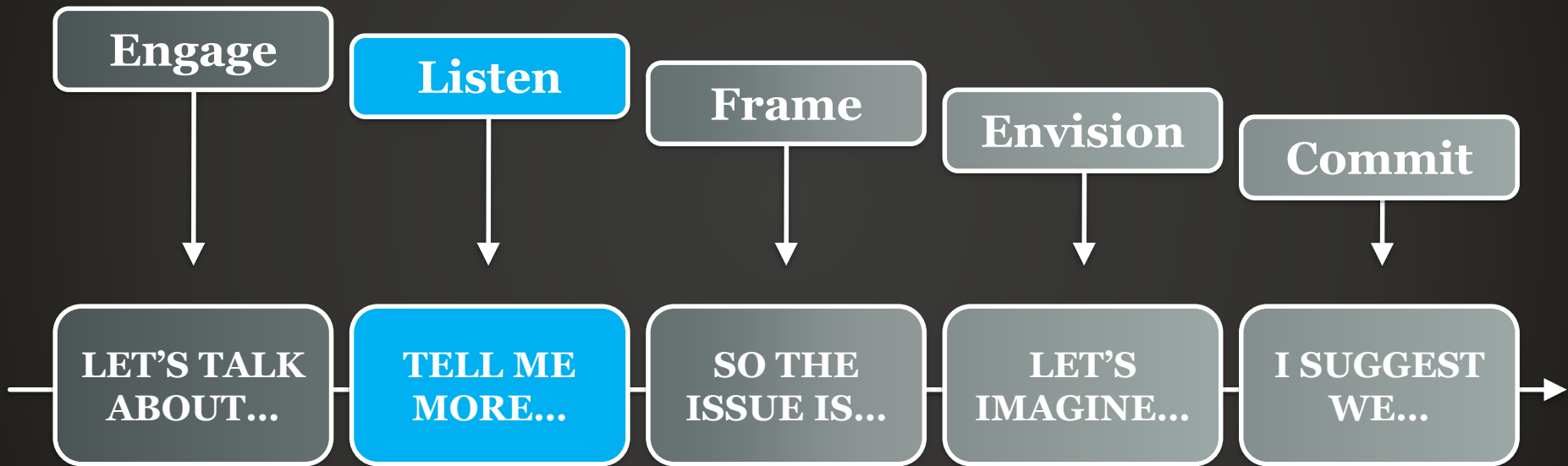
Not listening has big consequences

“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.”



Listening matters ... a lot

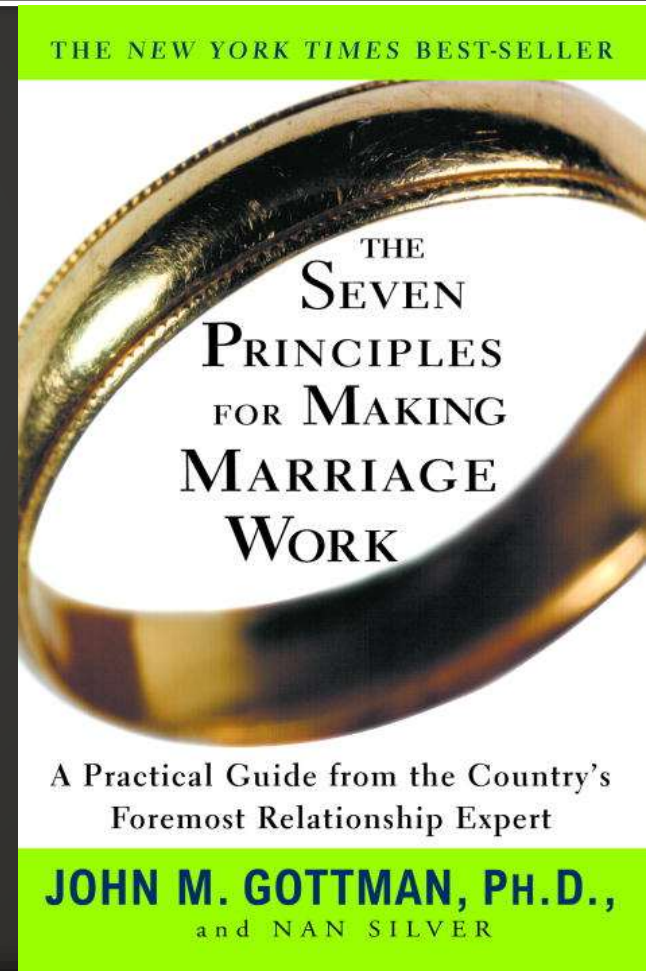
pp. 24-25



It turns out the *quality* of our listening also matters ... a lot

“Understanding must precede advice.”

“You have to let your partner know that you fully understand and empathize ... before you suggest a solution.”



Influence is a function of listening, not talking



empathy

p. 27

NON-RATIONAL



Empathize

→ Earn the Right ←

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**
 - Customer—*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

p. 28

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?



Make it real: Customer listening

p. 29

Consider your **client opportunity / situation.**

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



We've covered a lot of ground

Workshop 1

Foundations for
Success



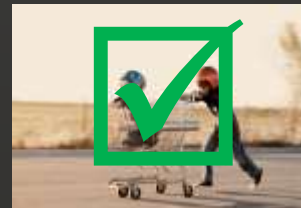
Buyer
Psychology



Making it
Real



Assessing
Trustworthiness



Being More
Influential

Make it real

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

Get your “weekly drip”

[Your Weekly Tip] Intimacy? At work? Really?

Intimacy? At work? Really? (Part III)

Andrea.

This is our last tip (for now) in a three-part series on the subject of intimacy—a word that businesspeople don't usually associate with professionalism.

And yet, intimacy is a critical ingredient for trust-based relationships. It suggests a level of comfort, security, and rapport that directly impacts your ability to be influential, and that fosters the kind of relationships that make your businesses thrive.

In Parts I and II we looked at ways to build intimacy by being positive and personal.

Today, we focus on being bold—in other words, having the courage to take personal risks that build trust in a relationship.

Make it Real

This week, step outside your comfort zone. Here are three ways to do that:

1. **Acknowledge uncomfortable situations.** Caveats are conversational jewels: “Wow, this is awkward...” or “I wish I had better news...” or “The timing with this is embarrassing...”
2. **Say what needs to be said.** Practice doing it in 10 words or fewer. “We’re not going to make the deadline” or “We just don’t have the executive sponsorship we need” or “Jim is leaving the team.” The direct approach works especially well in combination with caveats (see #1).
3. **Take responsibility for mistakes.** Yeah, it’s risky. It’s also human (we all make them) and refreshingly real. “Janet, part of the problem here is that I dropped the ball.”

Learn More

See our [Top 10 list of intimacy-builders](#). Or discover your score on the [Trust](#)

dvisor

The Trust Principles define four key values

p. 31

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**

Introducing ... your Monday Morning Promise

1. Put two people in your network in touch *with each other*
2. Call a past client with no agenda
3. Send three handwritten notes
4. Have a meeting where your *only* goal is to listen
5. Invite a client for dinner ... six months from now
6. _____

M
O
N
D
A
Y

There's homework!

1. Identify one next action to take with your client opportunity / challenge
2. Create your 30-day experiment
3. Make your *Monday Morning Promise*
4. Brainstorm ways to do more *Selling by Doing*
5. Brainstorm ways to generate additional assignments using the Trust Equation
6. Read Chapter 12: Trust Based Networking

p. 35

p. 36

Make it real

p. 37

#10



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How will you choose ...

A photograph of a stage with heavy red curtains. A circular spotlight illuminates a microphone stand in the center of the stage. The floor is covered with a patterned carpet.

... to set yourself apart?