



## 82 WAYS TO BUILD CLIENT TRUST

Using the [Trust Equation](#) from the books [The Trusted Advisor](#) and [The Trusted Advisor Fieldbook](#), discover 82 specific ways to increase the level of trust in your client relationships. Which one will you put into practice today?

### CREDIBILITY

#### WORDS

“I can trust what she says about...”

Credentials

Truthfulness

Credibility exists in the domain of words. It is created through your credentials, truthfulness, and how you present yourself.

1. Be diligent about researching your client
2. Know about industry trends and info, business news
3. Take the initiative to expand your knowledge
4. Ask great questions
5. Write about your areas of expertise—articles, blogs, white papers
6. Express your passion for your subject
7. Host an event that brings key stakeholders together; be the moderator
8. When you present, practice practice practice so your delivery is relaxed
9. Use metaphors, stories, and vivid examples to share your ideas, prove your point
10. Offer your point of view when you have one
11. Share the “why” behind your point of view
12. Be articulate and thoughtful when you express yourself
13. Find ways to demonstrate your expertise; don’t just talk about it
14. Say “I don’t know” when you don’t know
15. Never ever lie
16. Report regularly on project progress/measures
17. Combine your words with presence—a firm handshake, eye contact, confident air
18. Be humble; remember there is always more to learn

### RELIABILITY

#### ACTIONS

“I can trust him to...”

Dependability

Predictability

Reliability occurs when you prove yourself dependable and predictable over time.

19. Set expectations up front and report on them regularly
20. Be prepared for meetings
21. Be at least on time if not early
22. Be unbelievably responsive
23. Make lots of small promises and consistently follow through
24. Announce changes immediately and acknowledge the impact—especially when you won’t deliver as promised
25. Create documents and deliverables with a consistent look and feel
26. Be rigorous about using good business practices, such as meeting agenda and notes
27. Use others’ terminology and templates
28. Establish routines in your relationships (regular meetings, emails, etc.)
29. Reconfirm scheduled events
30. Only cancel if you absolutely must
31. Dress appropriately

## 82 WAYS TO BUILD CLIENT TRUST (CONT.)

### INTIMACY

#### SAFETY

"I can trust her  
with ..."

Discretion

Empathy

Personal Risk-Taking

Intimacy exists in the domain of *emotions* and emotional connectedness. It includes a visible demonstration of empathy, discretion, and personal risk-taking—all of which make it possible for clients to flourish in a comfortable and safe working environment.

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| <ul style="list-style-type: none"> <li>32. Be relentlessly discreet; honor confidentiality</li> <li>33. Address your client by name</li> <li>34. Adopt a friendly tone</li> <li>35. Ask something personal</li> <li>36. Ask others about their feelings</li> <li>37. Share something personal</li> <li>38. Tell your client something you appreciate about him/her</li> <li>39. Use colloquial language</li> <li>40. Be willing to show your emotions (elation, frustration, etc.)</li> <li>41. Acknowledge uncomfortable situations</li> <li>42. Send a hand-written note of acknowledgment/thanks</li> <li>43. Make the first move</li> <li>44. Ask open-ended questions</li> <li>45. Use expressive/friendly body language</li> </ul> | <ul style="list-style-type: none"> <li>46. Practice different ways of asking difficult questions or making difficult statements before you deliver them</li> <li>47. Take responsibility for mistakes</li> <li>48. Hold others accountable</li> <li>49. Write your next proposal <i>with</i> your client</li> <li>50. Be candid—Name It and Claim It!</li> <li>51. Don't gossip or promote relationship "triangles"</li> <li>52. Think in advance of how your client is likely to react</li> <li>53. Talk more with your eyes, ears and body, and less with your mouth</li> <li>54. Be empathic in all your interactions; practice Three-Level Listening</li> <li>55. Celebrate success with your client</li> <li>56. Extend yourself—e.g., Invite your client to meet you outside of work, share a meal</li> <li>57. "Be yourself. Everyone else is already taken."</li> </ul> |
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To be other-oriented is to be consistently focused on your client's wants and needs.

### OTHER-ORIENTATION

#### FOCUS

"I can trust that she  
cares about..."

Motives

Attention

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| <ul style="list-style-type: none"> <li>58. Find out how your project team defines success and how you can help them achieve it</li> <li>59. Don't jump to problem-solving—slow yourself down by counting, taking notes, vocalizing expectations</li> <li>60. Set aside the "spin"</li> <li>61. Let go of trying to appear clever, bright, witty</li> <li>62. Be self-deprecating</li> <li>63. Confront issues as they arise—being preoccupied with them keeps your attention on your own preoccupation</li> <li>64. Answer direct questions with direct answers</li> <li>65. Give voice to your fears</li> <li>66. Know your own traps/triggers and manage them well</li> <li>67. Don't interrupt</li> <li>68. Watch a tendency to name-drop</li> <li>69. Call your client just to find out how he/she is</li> </ul> | <ul style="list-style-type: none"> <li>70. Eliminate your jargon from your conversations</li> <li>71. Put the PowerPoint deck aside</li> <li>72. Spend time in your client's shoes—imagine what it's like to be him/her; role play with a colleague</li> <li>73. Cultivate an attitude of curiosity—think in advance about what questions you want to ask</li> <li>74. Practice "thinking out loud" with your client</li> <li>75. Let someone else have the last word</li> <li>76. Be really honest even (especially) when it makes you look bad</li> <li>77. Give others credit for successes</li> <li>78. Skip the "blame game"</li> <li>79. Take responsibility for failed communications</li> <li>80. Deliver "early and ugly"—collaborate and iterate</li> <li>81. Be willing to make a referral to your competition</li> <li>82. Step down when your heart's no longer in it</li> </ul> |
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