

Participant Learnings

Following are raw “take-away” statements from participants in previous **Trusted Advisor** and **Trust-based Selling®** sessions. These are responses to the question “What are the most important learnings for you from this session?”

Please review and use it to identify the learnings you would most like to see your participants take away from your session.

They have been grouped, somewhat arbitrarily, into the following categories:

1. client relationships
2. influencing and getting your advice taken
3. business development
4. problem solving
5. handling difficult situations

1. Client Relationships

- Treat people as they would want to be treated
- It's OK to talk about wants, not just needs
- It's about the client, not me
- It's a form of arrogance to tell the client what the agenda should be
- Client focus is personal, psychological, starts with me
- Talk about whatever's on their mind, not yours
- Saying you don't know helps credibility; not saying it destroys it
- Overly focusing on self is more about fear than greed
- Intentions matter: clients can tell
- Stories work
- A lot of this is about personal courage
- Have confidence—you've got a right to be where you are
- Think from the client's perspective
- Everybody's favorite subject is themselves, even when they deny it
- Get into your clients' heads
- Be client-oriented
- It's not about me!



- Connect to your client on the personal side
- Self-esteem and respect for others helps us and clients
- Intimacy is OK in the business environment
- We not me
- Ask the tough questions, they pay off
- Be yourself, everyone else is taken
- Stop and take the emotion seriously
- Anger isn't aimed at you personally—but it's still personal
- Learn to trust others
- Don't assume anything
- It's not about me
- Listen, listen, listen
- It's about the relationship
- There's always a deeper level, something else
- Listen to your gut, not just your head: trust your gut
- Using your own plain common sense; it's valuable
- Look for the structure that drives the behaviors
- Trust is mainly personal, not just institutional
- I am on the same side, not the opposite side, as my customer
- Gripping about your client is a waste of time
- Sincerity—you can't fake it
- The four trust values: client-centric, transparent, collaborative, Long-term
- You can craft the conversation
- The relationship is the client/customer
- Trust is hard learned, easily lost
- It's OK not to know all the answers—in fact, it's the beginning
- Trust-based can go beyond even win-win—to multiple win-wins
- Take a personal risk to lower future business risks
- Role-playing where you play your client
- Use stories in the 1st person, present tense
- Exceeding expectations all the time amounts to lying



2. Influence and Getting Your Advice Taken

- Can add value in ways other than giving the answers
- Good listening earns you the right to proceed
- It's not as much about expertise as we think
- You have to earn the right to be right
- Professionalism includes helping clients to envision better ways
- Don't jump to the answers even if tempted by the client
- Having a point of view is a very good thing
- Let the client do 90% of the talking
- When conversations shut down, take them back to the listening stage
- If I'm thinking about controlling the client, I'm thinking wrong
- Acknowledging, appreciating the things said
- Be curious, be courageous, be yourself
- It's not mainly about the content, even when they say it is
- Sharing it brings it together; brings insight
- You can never see your own situation objectively
- You never have all the information
- Clients want to know the limits of your knowledge, not its extent
- Pursue the personal, not necessarily the private
- Earn the right to be right
- Put yourself in the client's shoes
- Don't try to "control" your client—we not me
- Active listening
- Respect others' opinions, even when you disagree
- Use stories in first person, present tense

3. Business Development

- Listening is critical in selling situations
- People buy what they need from those who understand what they want
- The buying decision point is not words on paper
- Selling by doing, not selling by telling



- People buy through non-rational processes as well
- People buy what they need from those who understand what they want
- Buyers buy the seller, not the product or service
- Credentials get you in the door; then let them go and go to work
- Selling, thought about right, is the core of true professionalism
- Price and feature competition is just the absence of relationship strategy
- Selling is delivering is selling is delivering is selling
- Trust begins in the sales process
- It's OK to say you don't know when you don't know
- Do good work; separately, ask to get paid for it, and paid well
- Selling is very personal—because buying is
- Mention money earlier in the conversation
- Focus on the issue of the client at hand, not the last client's issue
- Selling is helping
- Intimacy and low self-orientation keys to trust/selling success
- We over-focus on selling studies, need to just listen more

4. Problem-Solving

- Frame without blame
- Be genuine
- The phrase “Help me understand...”
- Probe to find the real problem before providing answers
- Don't jump too soon into solutions
- Listen—at work and at home
- Listening is an active process
- Don't jump too quickly to the commit step in conversations
- Always keep an open mind
- Be able to envision and articulate future states to the client
- Spend time envisioning before moving to action steps
- The real value is in the discovery, problem definition, framing
- The power of role-playing—not just in workshops
- Win/win/win/win/win—dare to be great in envisioning outcomes



5. Handling Difficult Situations

- Radical truth-telling in a socially acceptable manner
- There's big value in speaking the hard truths
- Talk about the elephant in the room
- Taking a small personal risk now lowers business risk later
- Truth really does set you free
- Don't be afraid to claim issues
- Clarifying the problem is where value add happens
- You can't outrun reality
- The truth is easier to remember
- Be prepared to take the lead in risk, honesty
- Don't lie; but also, tell more truth

Trusted Advisor Associates

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