



# Being a Trusted Advisor

## The Clearing | May 9, 2014



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

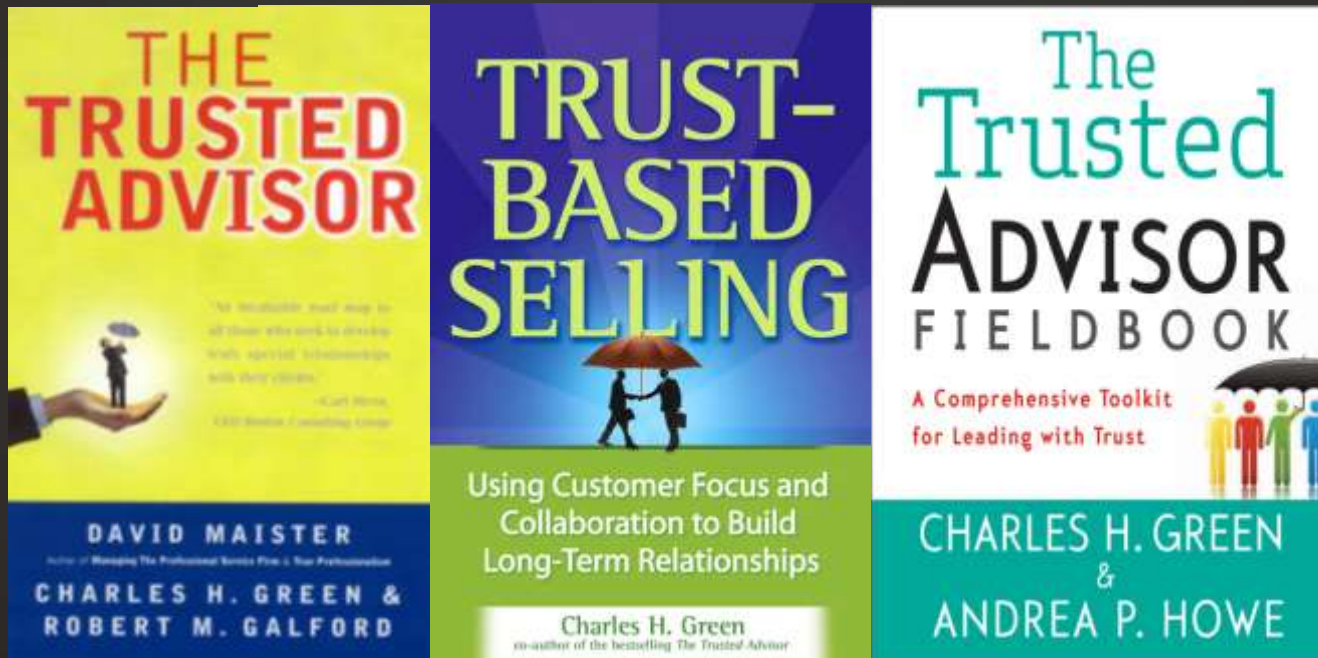
- A. Wait for Chuck to respond
- B. Press on
- C. Back out gracefully
- D. Get curious

# Trust is personal

1. Name
2. Project you are on now
3. How many months you have you been a consultant
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?

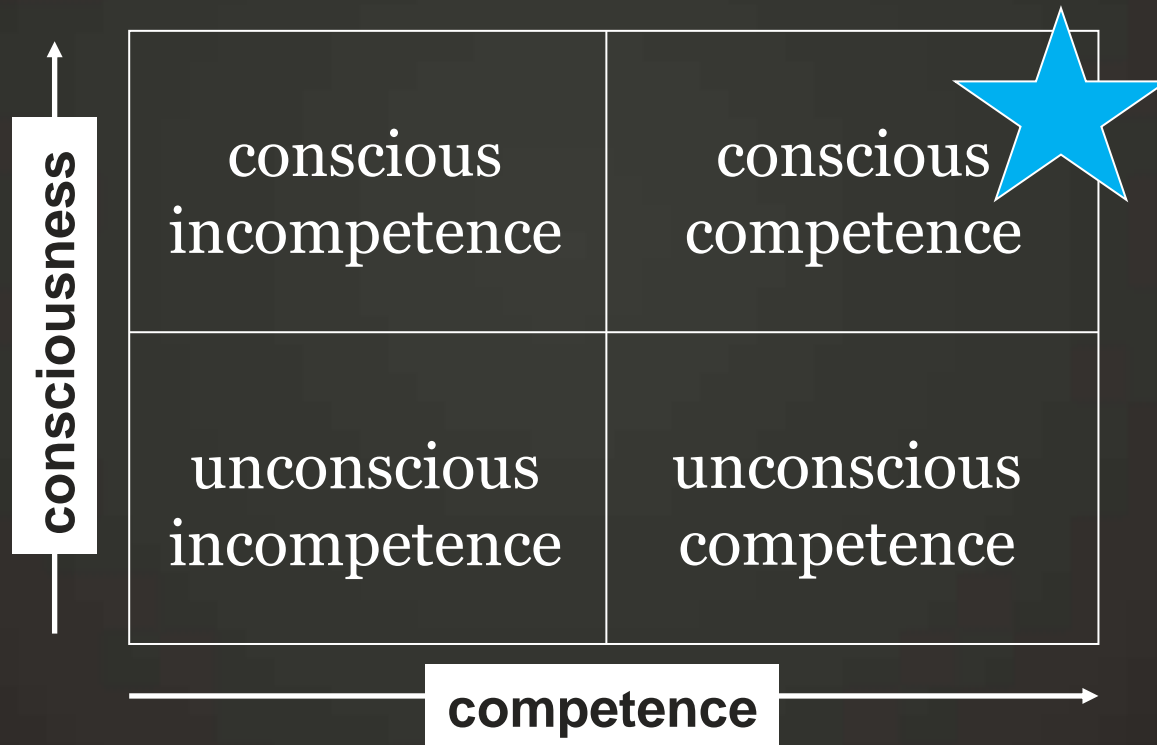
Work = enjoyable

Relationships = rewarding

Results = remarkable

What is the  
natural result  
when you are  
trusted by  
your  
customers and  
sponsors?

# “Mastery” is more than “really good”





# We'll be covering a lot of ground

## Day 1 Day 2

Defining  
Trust



Assessing  
Trustworthiness



Being More  
Influential



Managing  
Risk



Trust Based  
Selling



Making it  
Real





# What kind of environment will we create to get the desired results?



# 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

# Trust-based relationships are distinctive

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

# Remember your homework?

Bring to mind a “customer situation”:

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

Looking at your **customer situation**, where are you spending most of your time?

How would you frame the situation as a problem statement? (“The problem is \_\_\_\_\_.”)

	<b>Focus:</b>	<b>Energy:</b>	<b>Output:</b>	<b>Success:</b>
<b>Expertise-based</b>	Answers, expertise	Explaining	Information	Timely, high quality
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<b>Trust-based</b>	Partner as a person	Understanding partner	<b>Safe haven for tough issues</b>	Mutually rewarding relationship



# 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

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

**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



# The Case of the Travel Agent

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

Ideal outcome?



# Let's make it real



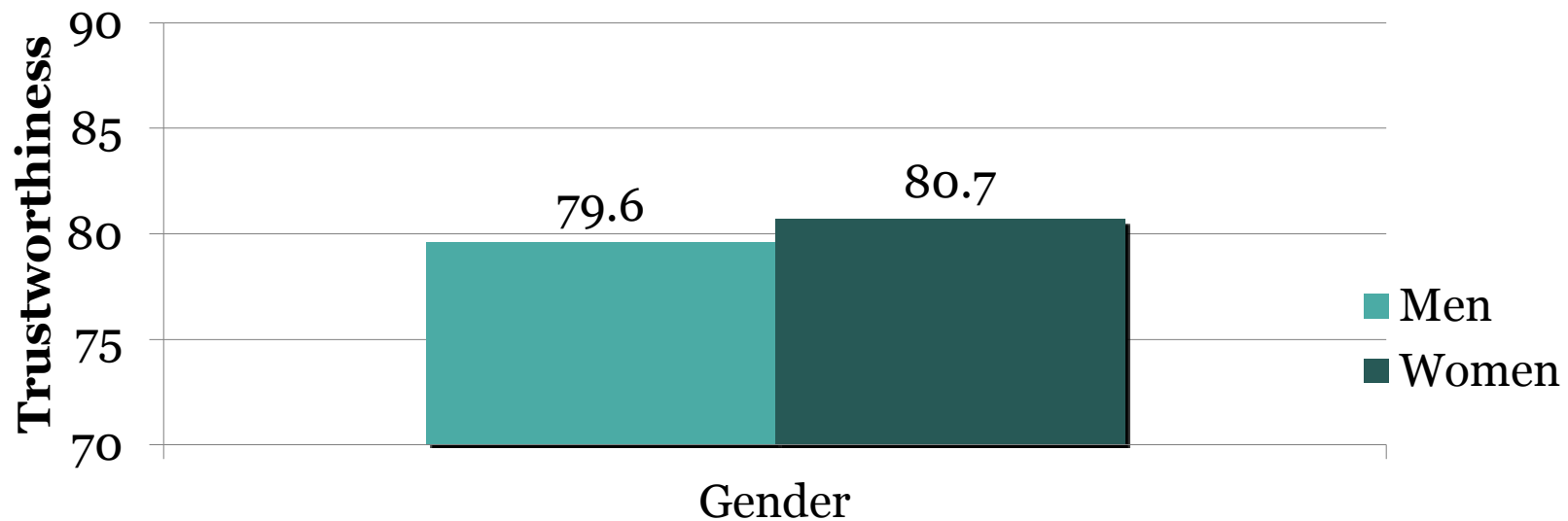
## Consider your **customer situation**.

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



# Who's more trustworthy: men or women?

N = 12,857





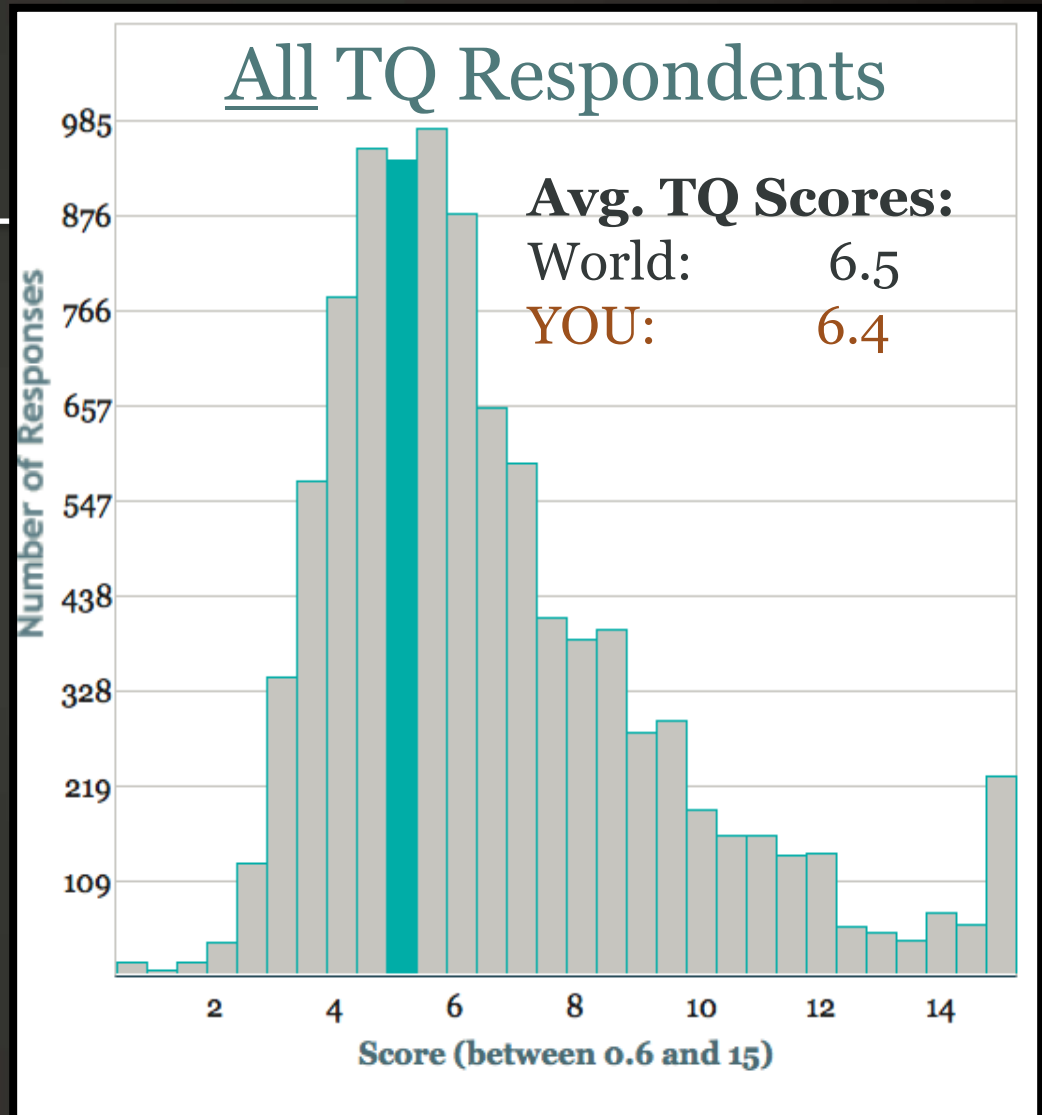
# Do we get more or less trustworthy as we age?



# How trustworthy are *you*?

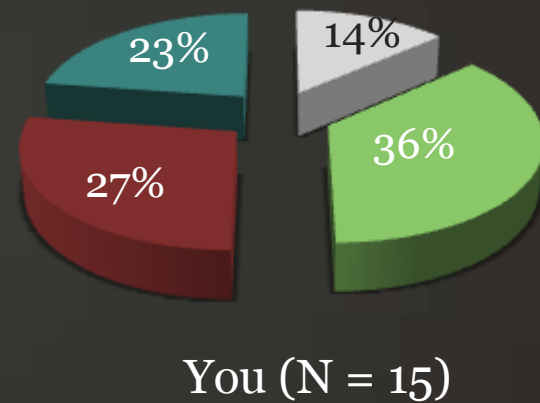
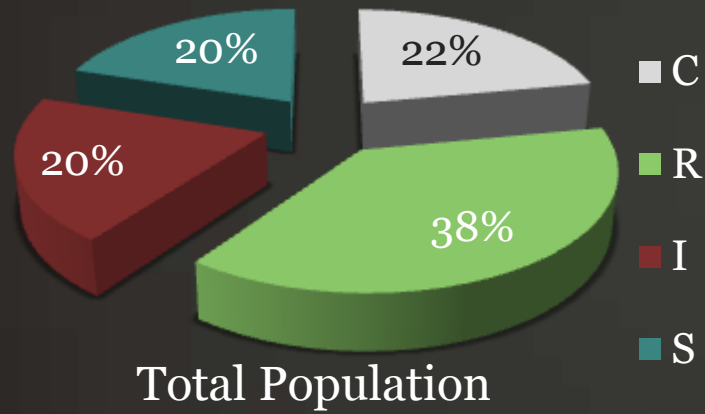
Note: Median  
skewed left

(3 x S)

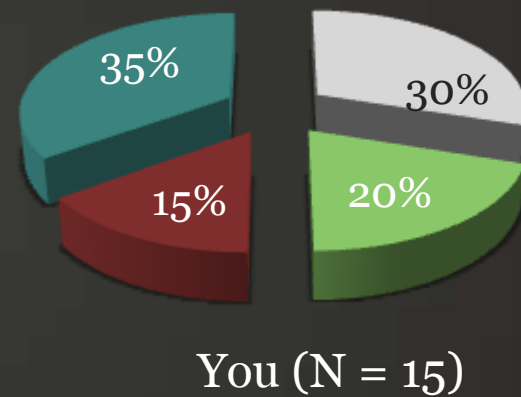
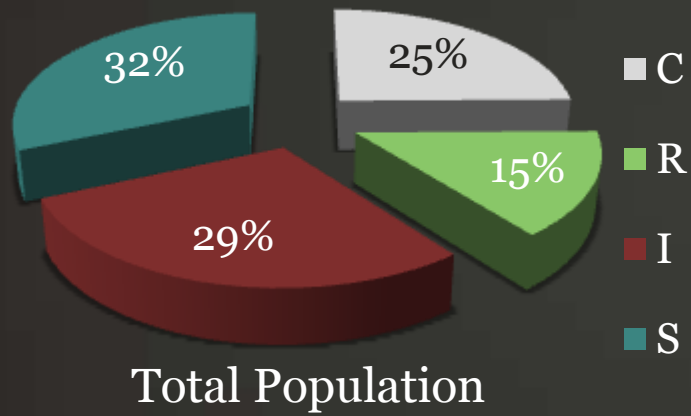




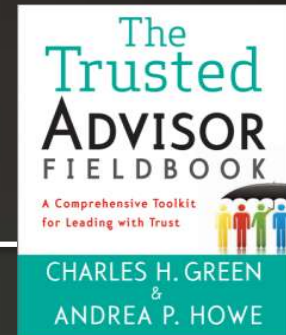
# Here's how you see your strengths



# 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?

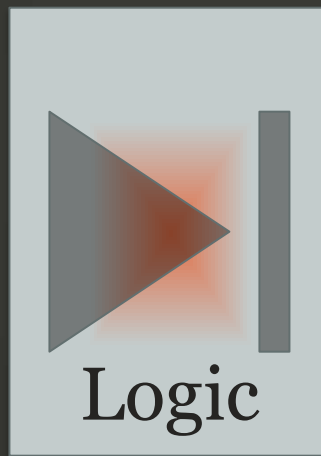
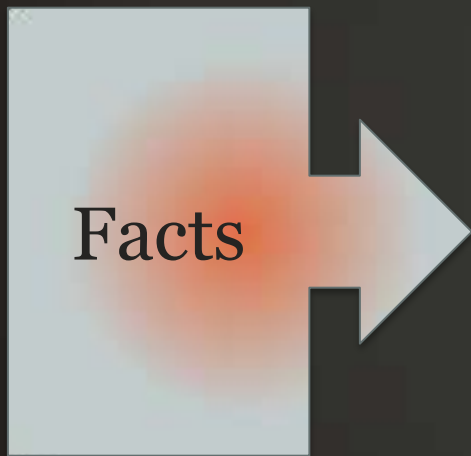
$$T = \frac{C + R + I}{S}$$

T trustworthiness  
C credibility  
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I intimacy  
S self-orientation

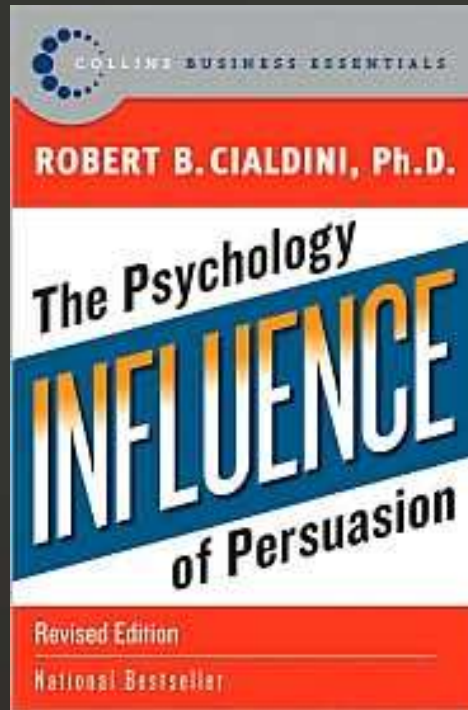
# Being More Influential



# Influence is as misunderstood as trust

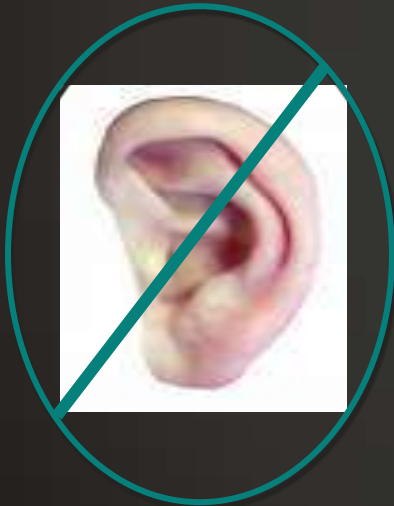


# What drives influence might surprise you

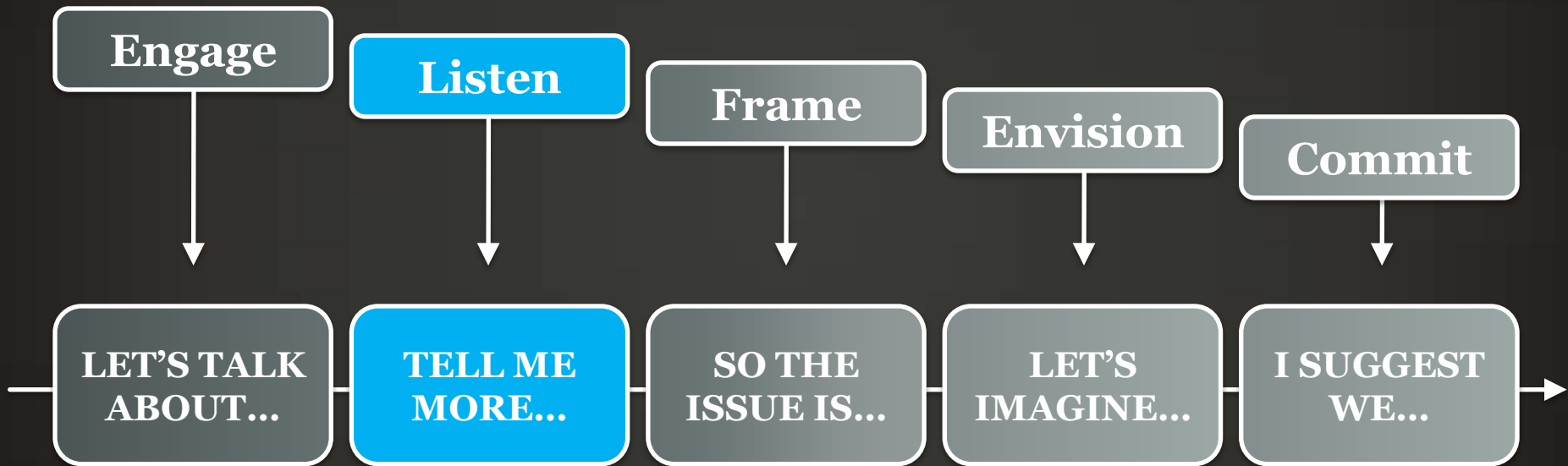


reciprocity

# Trust breaks down in conversations in two key ways



# Listening matters ... a lot

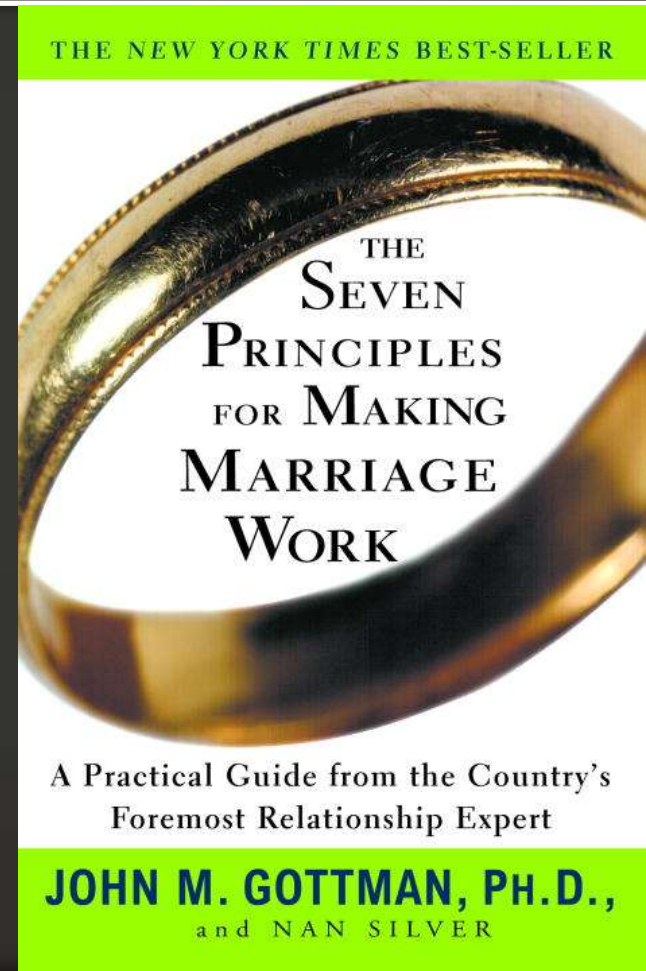




It turns out the *quality* of our listening also matters ... a lot

“Understanding must precede advice.”

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



Influence, 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
Customer	A	B	C
Listener	B	C	A
Observer	C	A	B

- **Groups of 3 in 3 rounds**
  - *Your own customer*
  - *Listener*
  - *Observer*
- **1-minute setup:**

Describe your customer's interests, concerns
- **4-minute role-play**
  - Customer—*be that customer; 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
  - Customer—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?
- **Customer**—What was your experience?



*What “ahas” did you have as your customer?*

# Let's make it real



## Consider your **customer situation**.

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

# Let's make it real



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

[www.trustedadvisor.com/theclearing](http://www.trustedadvisor.com/theclearing)





# Being a Trusted Advisor

## The Clearing | May 16, 2014

Welcome back.



# We're making progress

## Day 1 Day 2

Defining  
Trust



Assessing  
Trustworthiness



Being More  
Influential



Managing  
Risk



Trust Based  
Selling



Making it  
Real



# Let's make it real



How can you apply what you are learning to be Trusted Advisors to each other (i.e. within The Clearing)?

# 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™?

TrustedAdvisor ASSOCIATES LLC

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

Take our short quiz and receive a 20 page report that:

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 institutionalizing** like Bill Clinton?



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



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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

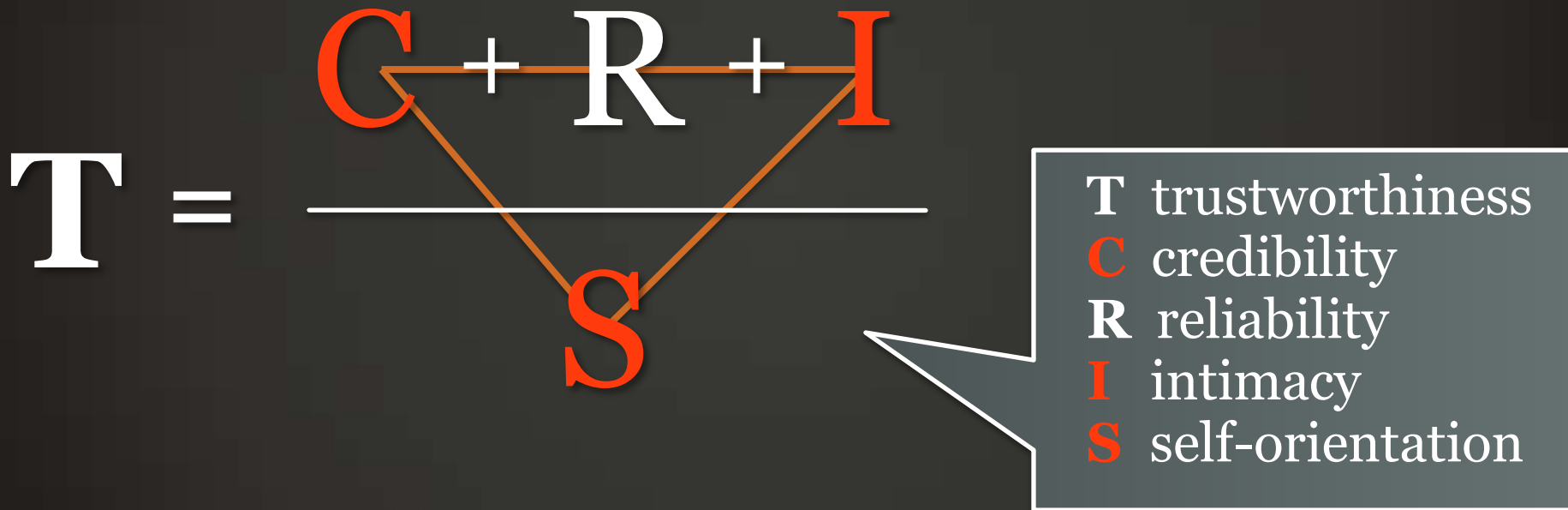
# Caveats are conversational jewels

- “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



# 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 **customer situation**.

- What haven't you been saying that needs to be said?
- How might you Name It and Claim It?

# Like death and taxes, problems are inevitable

---

The problem is \_\_\_\_\_.

# Unfortunately, “my customer 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

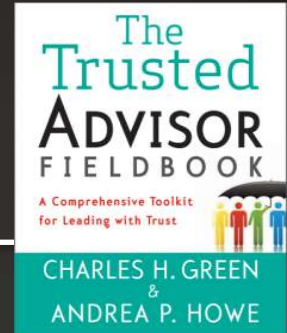
Version 1.1: Remove he/she/they

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 customer—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.”





# Trust Based Selling



# The definition of “sell” isn’t pretty

## Full Definition of SELL



*transitive verb*

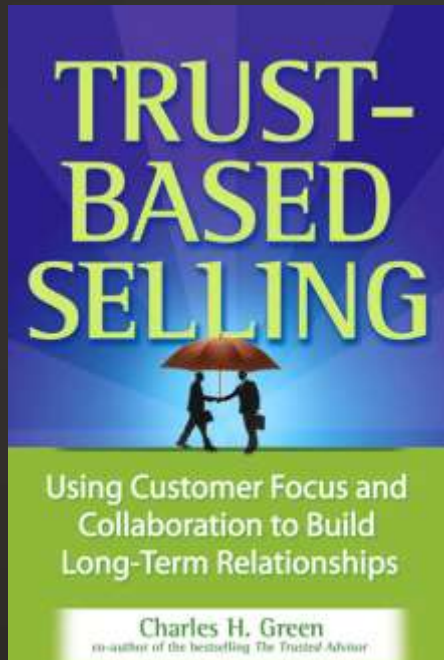
**1** : to deliver or give up in violation of duty, trust, or loyalty and especially for personal gain : **BETRAY** —often used with *out* <*sell out* their country>

Source: <http://www.merriam-webster.com/dictionary/sell>

# 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.”*

# ... and helping isn't smarmy.

# The Trust Principles - four key values to live by

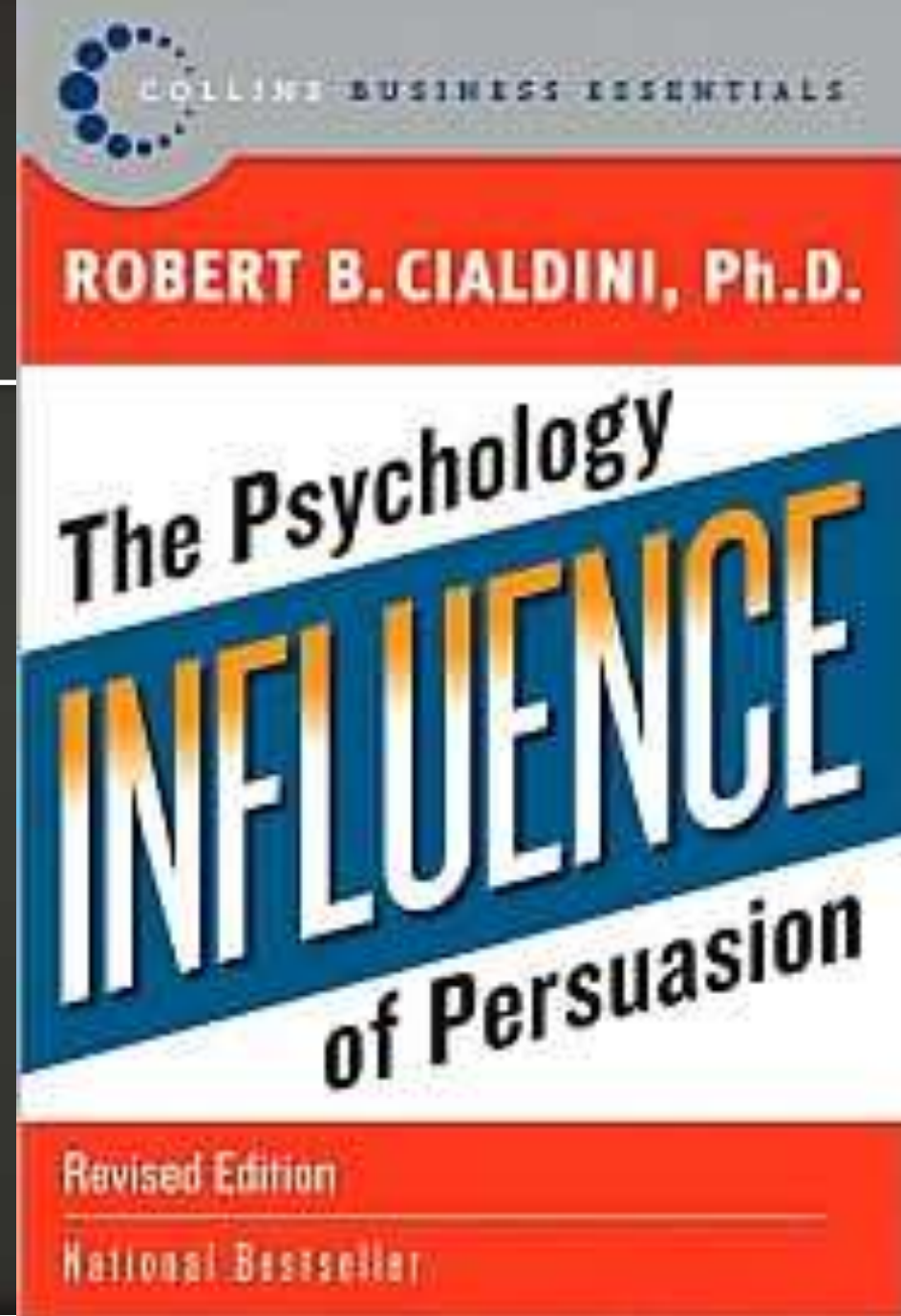
1. Other-focus—**for their sake, not yours**
2. Medium- to long-term—**relationship, not transaction**
3. Collaboration—**working with, not to/for, the client**
4. Transparency—**except where illegal or injurious**

# Answering 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 change?
6. Why are you so much more expensive?

# Sales and Influence

What's the number one factor of influence?





# Listening also drives sales

“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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NEIL RACKHAM.

# SPIN SELLING

SITUATION · PROBLEM · IMPLICATION · NEED · PAYOFF

THE BEST-VALIDATED SALES METHOD AVAILABLE TODAY. DEVELOPED FROM RESEARCH STUDIES OF 35,000 SALES CALLS. USED BY THE TOP SALES FORCES ACROSS THE WORLD.

Copyrighted Material

# The Case of the Law Firm

Listening

Client focus

A sense of theatre and  
willingness to take risks

A shrewd way to  
differentiate

Selling by doing





# Selling by Doing

- Shows low self-orientation
- Demonstrates a willingness to take risks
- Exemplifies collaboration
- Adds value in-the-moment
- Makes the abstract feel tangible



# How do you apply the trust principles to developing business?

Other-focus	Collaboration	Med to LT view	Transparency
Offer a client three ideas for improving their performance in the next quarter without any extra work	Start internally: take concrete steps to break down silos	Revisit the list of clients you screened out and find out what they're up to	In sales conversations, compare your offerings to others—share the good, the bad, and the ugly

# Putting It All Together

A young girl with dark hair and large black-rimmed glasses is the central figure. She is wearing a bright pink cardigan over a white shirt and a purple and white striped bow tie. Several yellow, pink, and blue sticky notes are stuck to her face and clothing. The background is a light gray wall covered with many more floating sticky notes of various colors (yellow, pink, blue, orange, purple) scattered across the frame.

# There's something about Mary

What's your  
minimum  
acceptable  
outcome?

Ideal outcome?



# We've covered a lot of ground

## Day 1 Day 2

Defining  
Trust



Assessing  
Trustworthiness



Being More  
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Managing  
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Making it  
Real



# Let's make it real



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



# Let's make it real



## 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?

# Let's make it real

1. Define an action plan for your customer situation
2. Create your 30-day experiment
3. Find a partner and make your declaration!





Let's make it real



#38



How will you choose ...

Cate Gregory  
[cgregory@trustedadvisor.com](mailto:cgregory@trustedadvisor.com)  
1-703-346-5050, [LinkedIn](#)

... to set yourself apart?