



The Relationship Lab: Complex Customer Engagements

MITRE

September –
December 2017

What makes complex relationships ... so complex?

1. Find someone with a **different** role
2. ID **one challenge** that naturally arises between the two
3. Repeat!



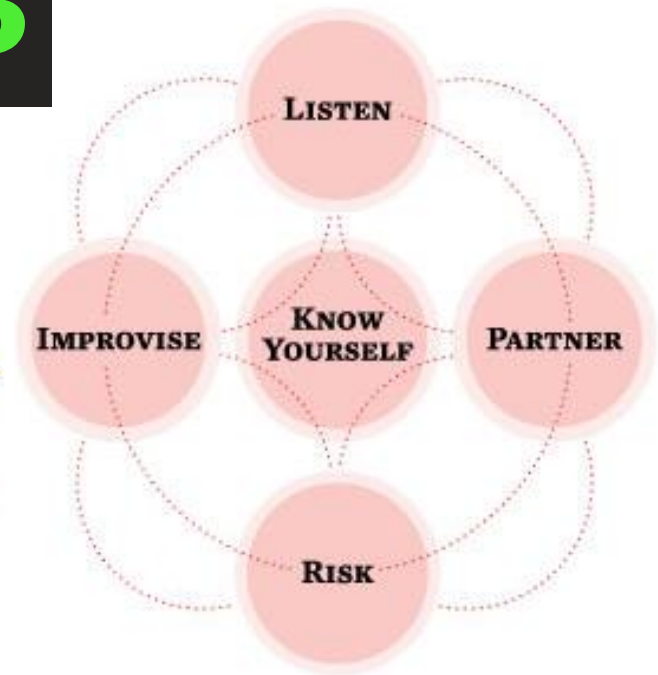
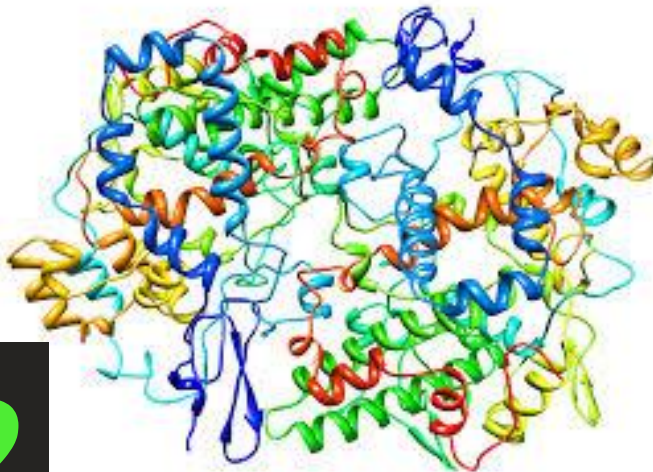
We have three big goals

1



3

2



Tell us about you

p. 3



A red and white name tag template. The top half is red with the text "Hello" in large white letters and "my name is" in smaller white letters below it. The bottom half is white with a red border at the bottom, providing a blank space for a name.

This isn't "Batman Returns"

Then

Training

Introduction.....

One customer

30 days

Now

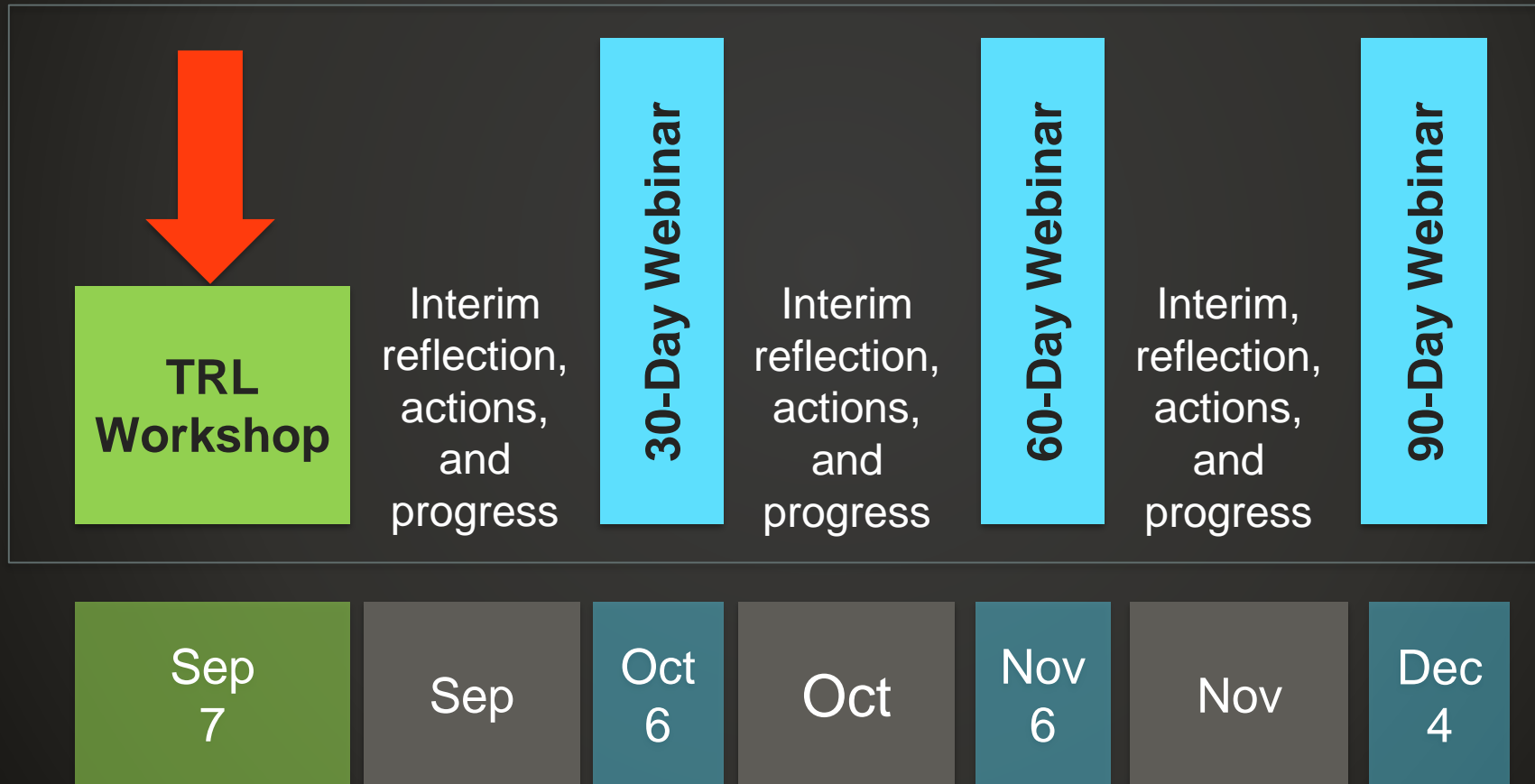
Working session

Advanced application

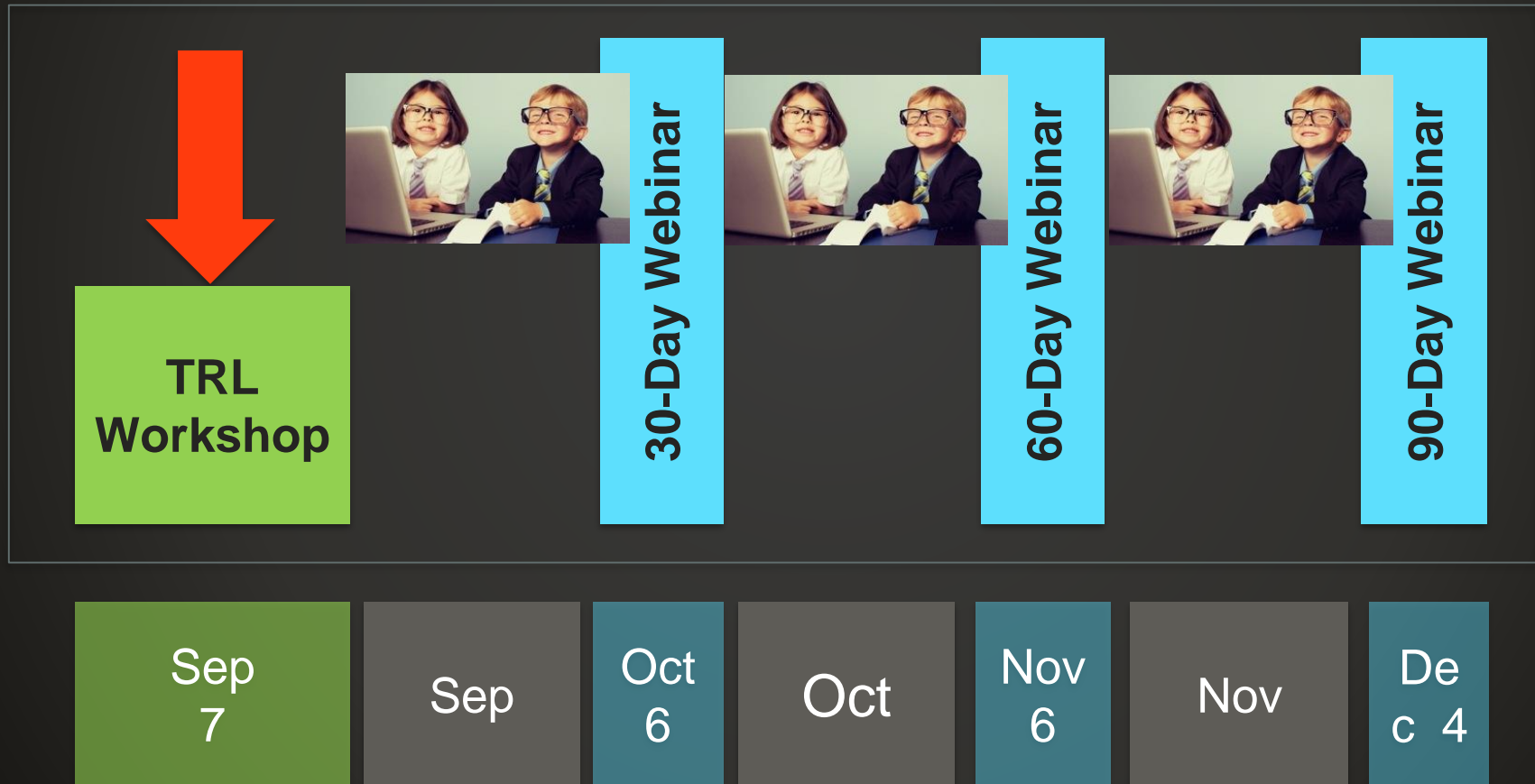
Complex situation

90 days

Your program continues past today

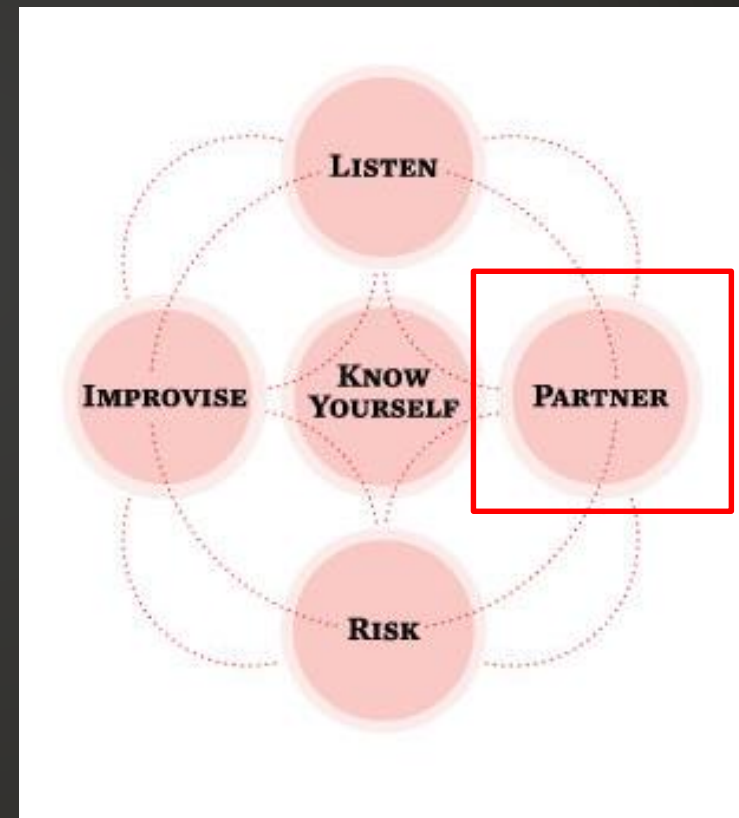


Structures will support you



“Howdy, partner.”

You will work with
the same
accountability
partner throughout
the program



FJ: TRL03

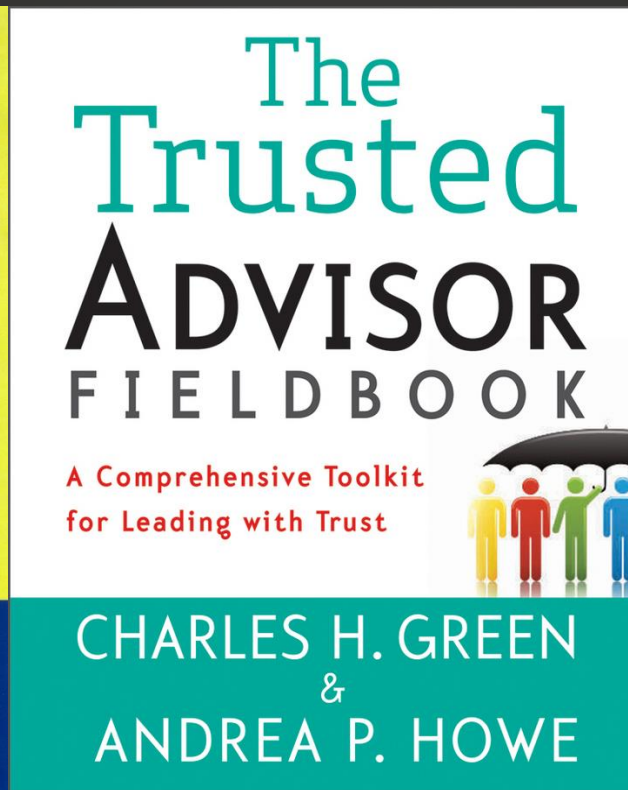
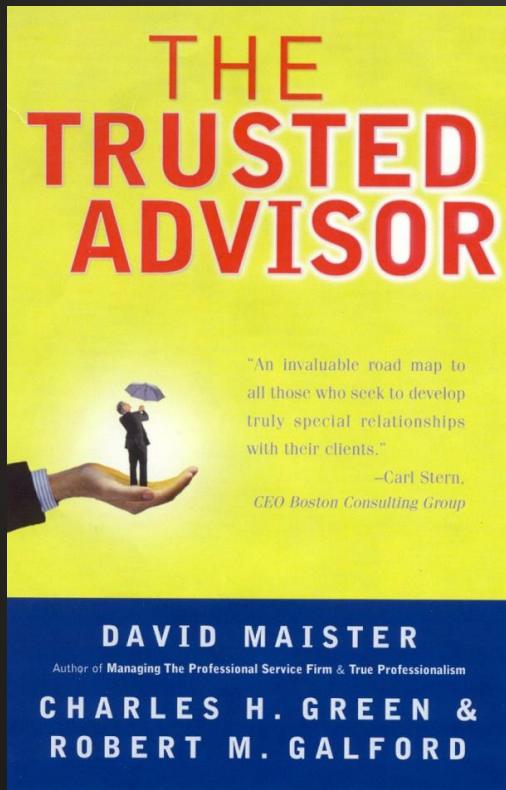
www.trustedadvisor.com/MITRE_TRL03

What's in the lab?



You recall our building blocks

p. 1



TECHNIQUES Tactical	Re-framing		
	Name It and Claim It		
	Paraphrase and Empathize		
MODELS Behavioral	The Trust Equation		The Trust Creation Process (ELFEC)
MINDSETS Contextual	The 3 P's of Trust		The 4 Trust Principles
			4 Levels of Customer Relationship

Old—and new—ground rules apply



How's your recall?

p. 4

Quiz!



1. C = Truthfulness + Credentials

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*

2. True reliability requires consistency

Words

Credibility

Truthfulness
Credentials

*I trust what she
says about...*

Actions

Reliability

Dependability
Predictability

I trust him to...

3. Personal risk-taking increases intimacy

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...*

4. The more you know yourself, the better you can manage yourself

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...*

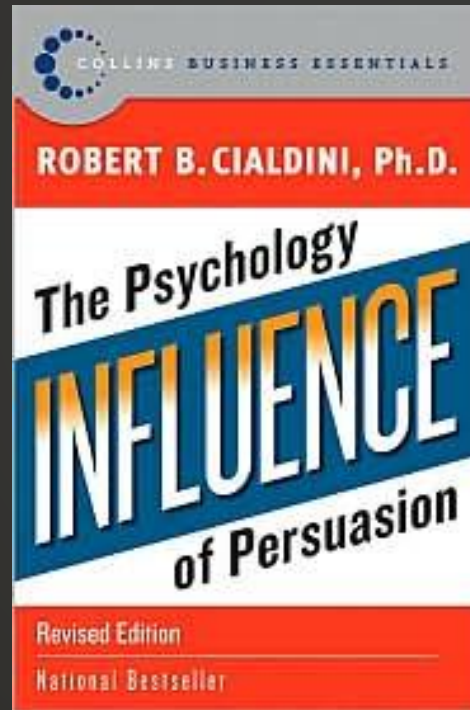
Focus

Self-Orientation

Motives
Attention

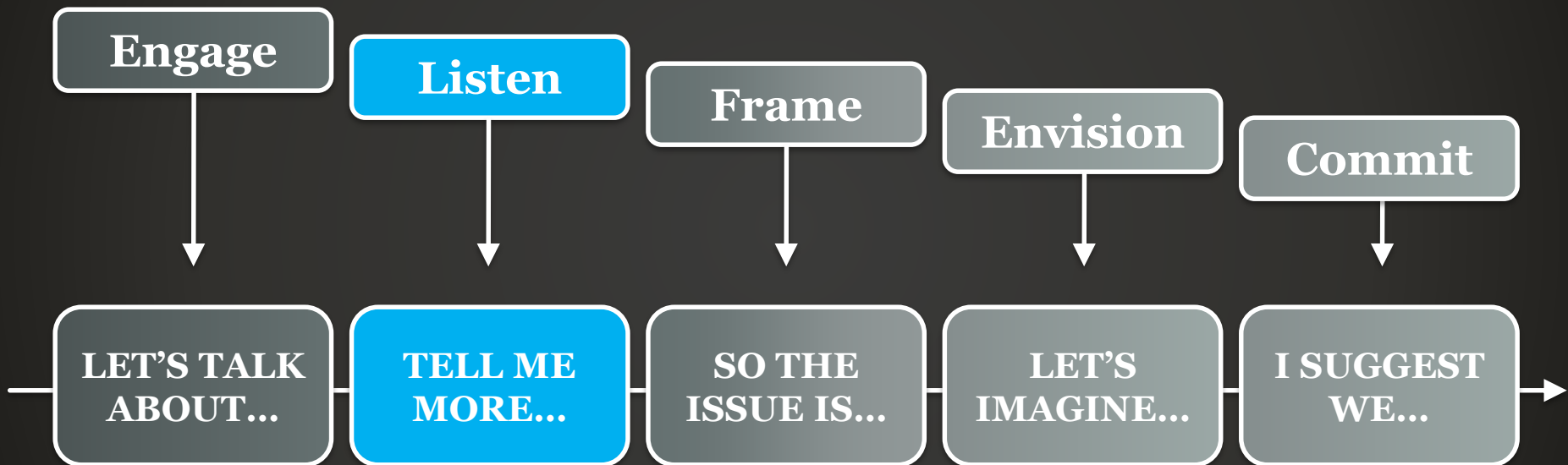
*I trust that he
cares about...*

5. What drives influence might surprise you



reciprocity

6. Listening matters ... a lot



7. These two skills are key

RATIONAL



Paraphrase

NON-RATIONAL



Empathize

→ Earn the Right ←

8. People don't care how much you know ...

“Tell me more ... please.”



9. A caveat is a *warning*

“There’s really no easy way to say this ...”

“At the risk of embarrassing myself ...”

“I may be completely missing the mark ...”

“This is awkward ...”

“I’m going to go out on a limb ...”

“You’re not going to like what’s coming ...”

10. Trust-based relationships are distinctive

Quiz

4.

Safe haven
for tough
issues

Trusted
Advisor

3.

Idea-
generator

2.

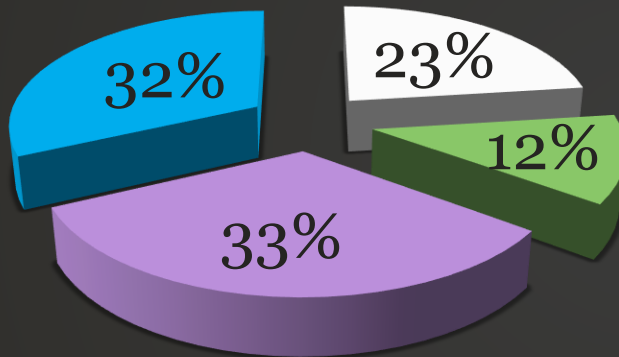
Problem-
solver

1.

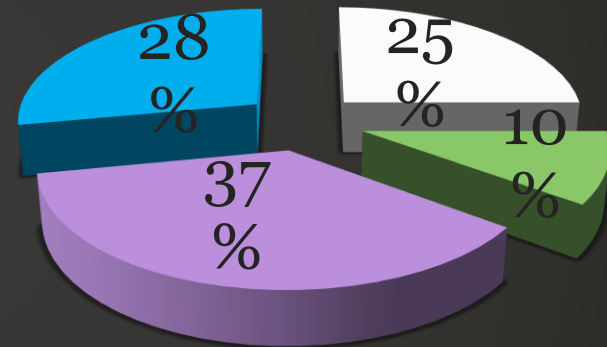
Information-
giver

Tie-breaker: Your biggest area of opportunity is intimacy

■ C ■ R ■ I ■ S



Total Population
N = 63,939



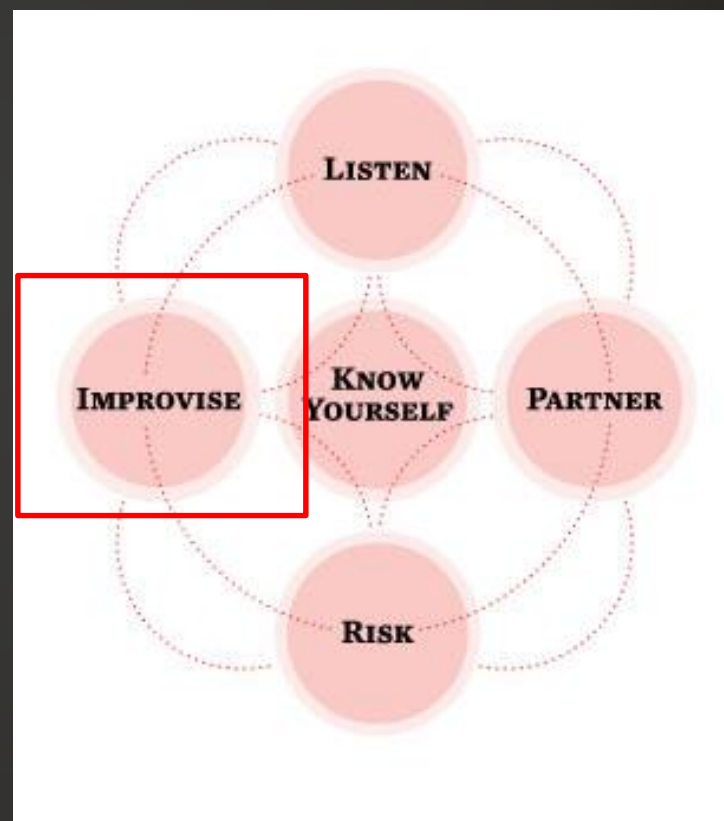
MITRE
N = 1,435

Zip – Zap - Zop

Things rarely go as planned

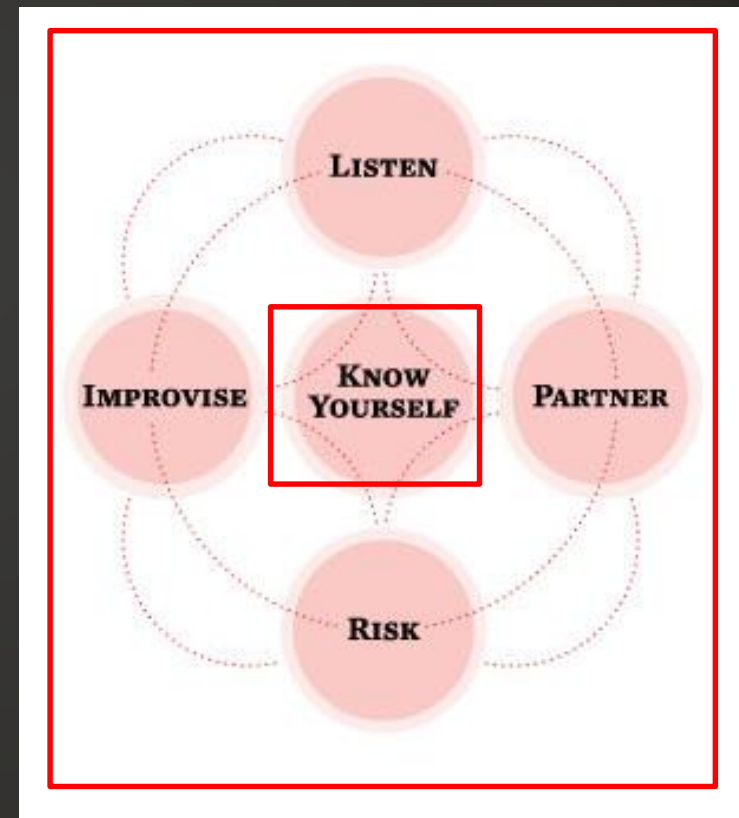
Q: Faced with a moment of truth, what do you do?

A: Improvise.



Know yourself ... on all five skills

p. 5



And Now Comes
“The Turning Point”

A Picture of rare beauty
A delight to mind and eye.

By Robert W. Chambers

pp. 6-7



HER THIRD PICTURE FOR FIRST NATIONAL

Presented by the Katherine MacDonald Pictures Corporation.

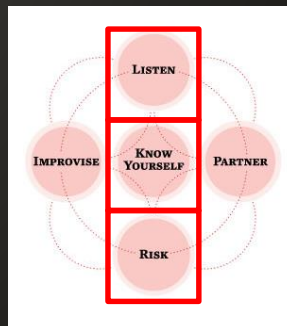
Directed by J. M. Barry

By Arrangement with Attractions Distributing Corporation. B. P. Fineman, President

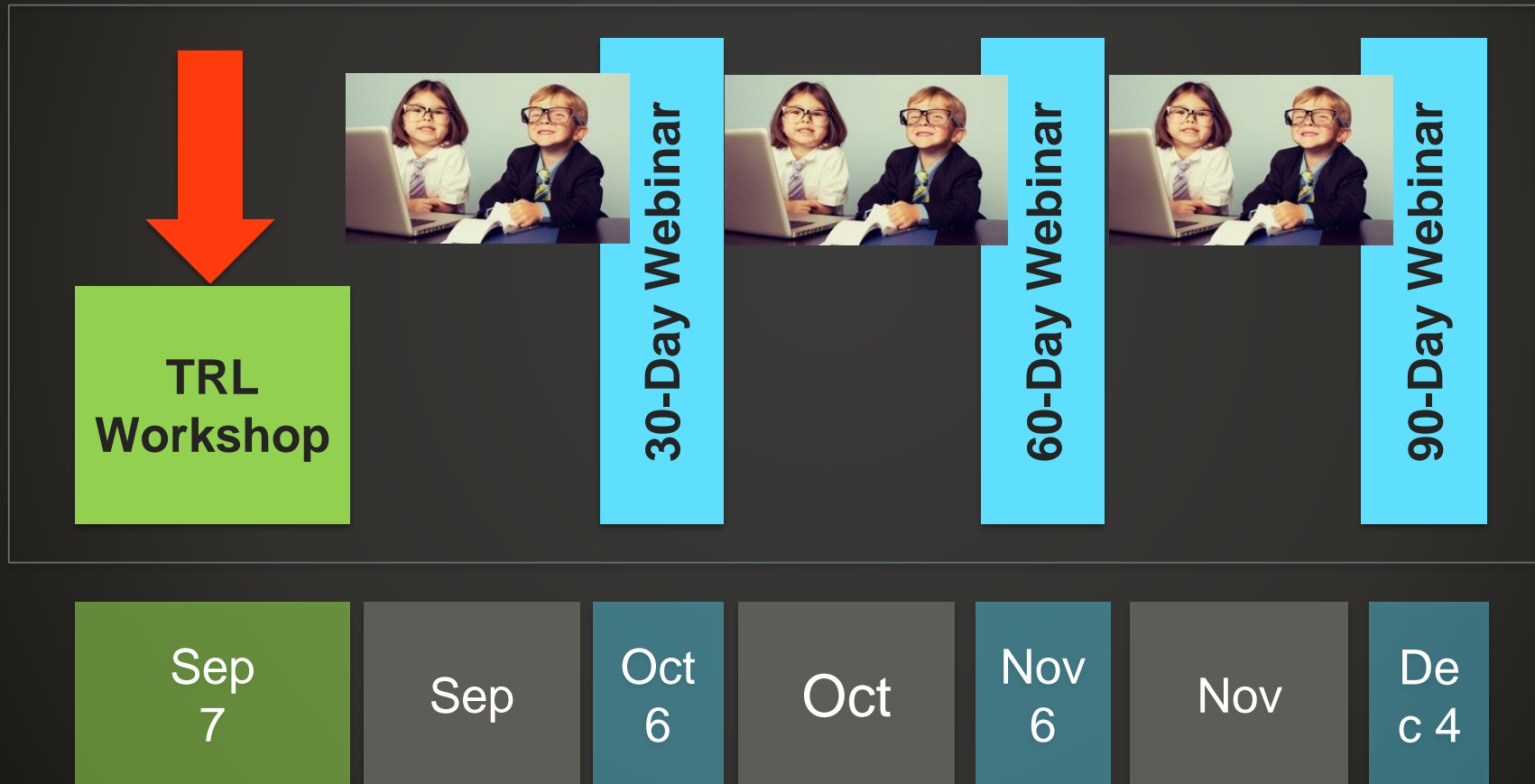
A “First National”



Attraction



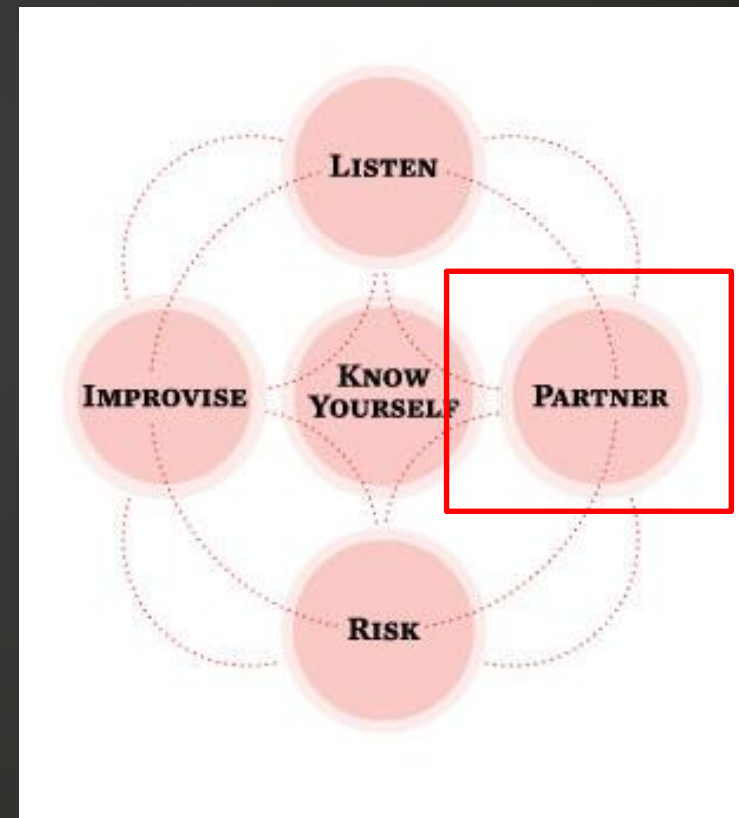
Structures will support you



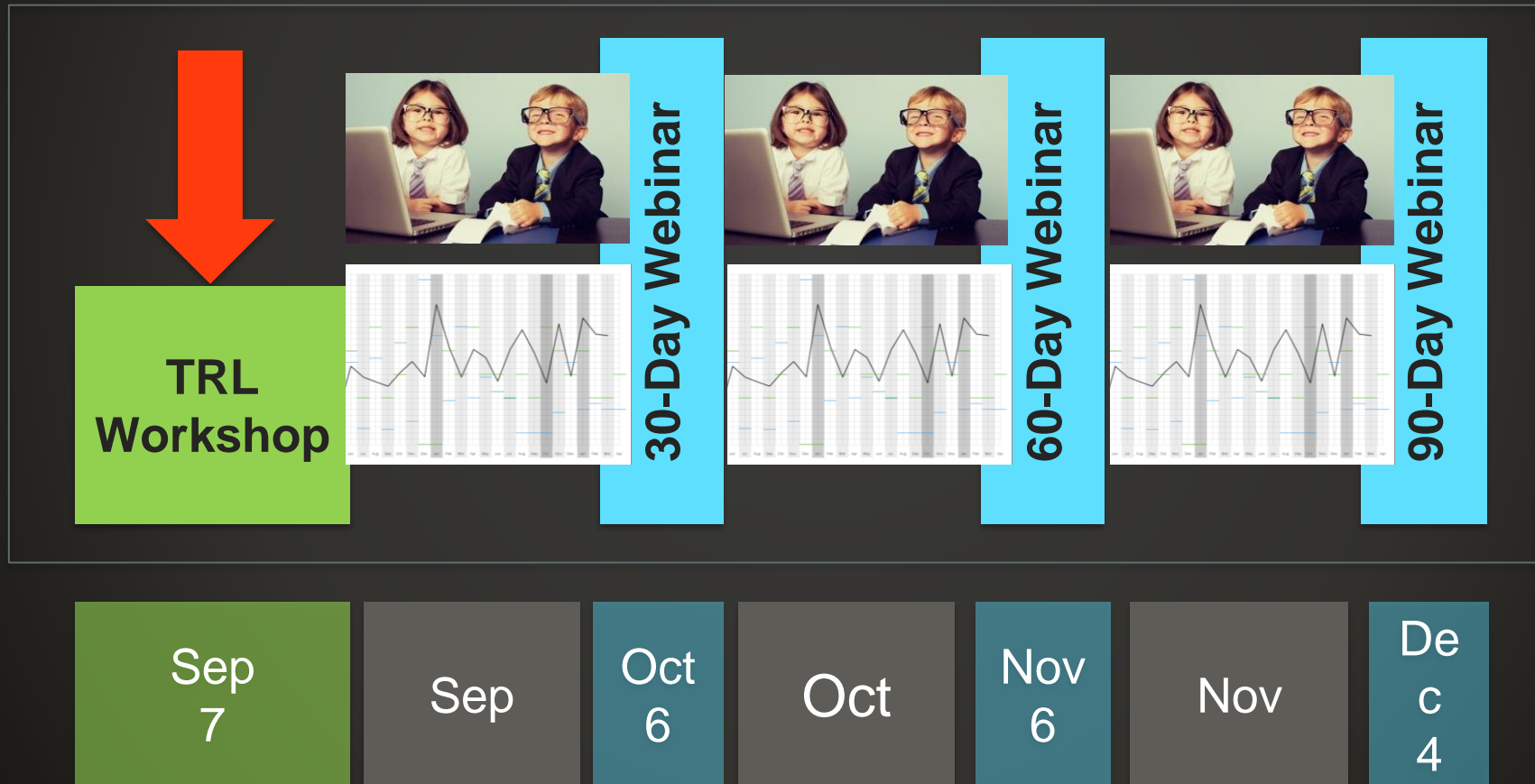
Getting to know you

pp. 8-9

Get acquainted and
set your
“partnership
parameters”



Structures will support you

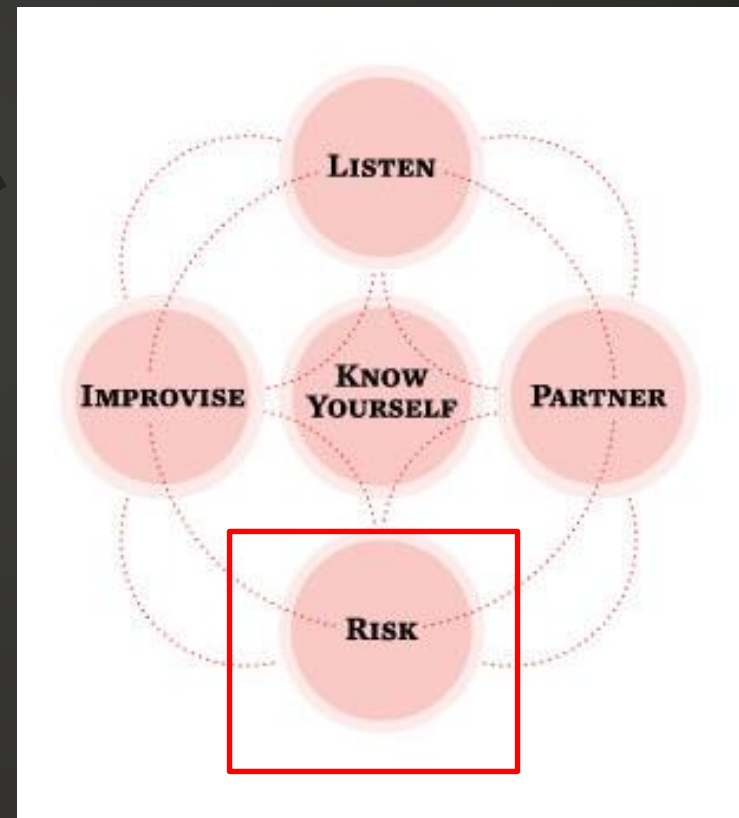
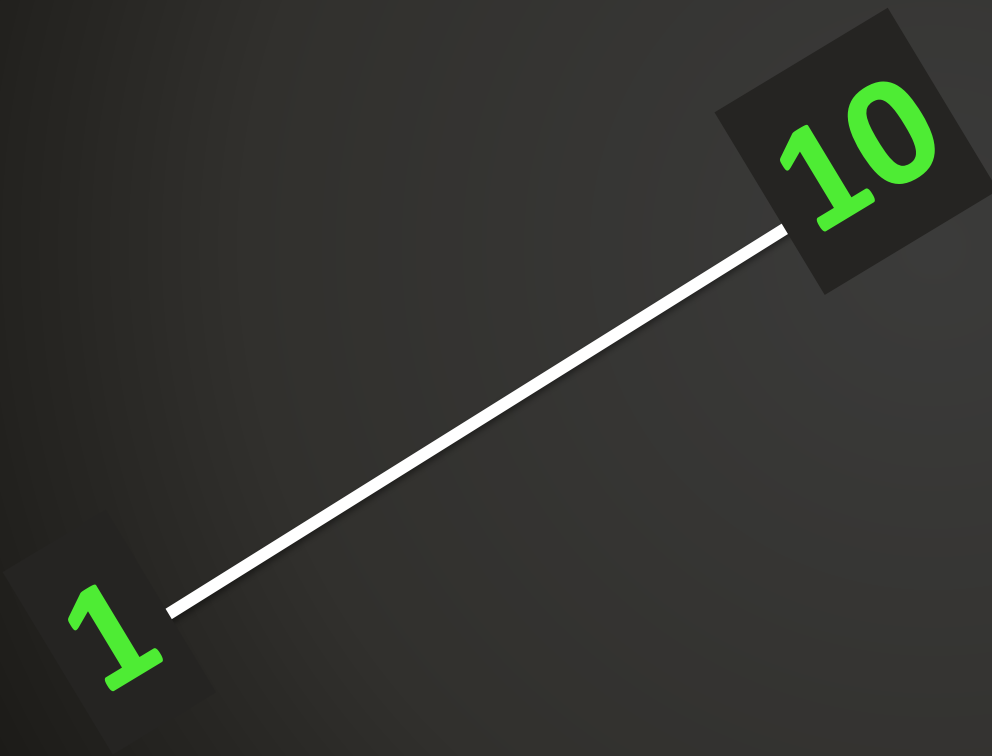


FJ: TRL03

More on the Results Tracker

Bottom line: The new or noteworthy result	What was different?	How would things have likely gone, prior to TRL?	Other comments
Your entries here.			

There is no trust without risk



Your Trust Landscape:

“The problem is ...”



The
Challenge

1. Current state: The true, root issue(s):

2. Desired state: What I envision is:

Key Stakeholder
Partnering Plan

Key stakeholders

The level at which I
am spending most of
my time

What he/she sees

What I wonder/
am curious about

Something I could do to
improve our partnership

3a

3b

3c

3d

pp. 10 - 12

Personal and Team Action Plan

4. Actions I will take personally

Intended result(s)

By when

4a

4b

4c

5. Actions I recommend WE (my MITRE team) take

Involving whom

Intended result(s)

By when

5a

5b

5c

With your AP...

pp. 10 - 12

1. Share your challenge and get help reframing from your AP
2. Envision an alternate state
3. Choose up to 4 key stakeholders to focus on
4. Switch

NOTE: You will each get 10 minutes

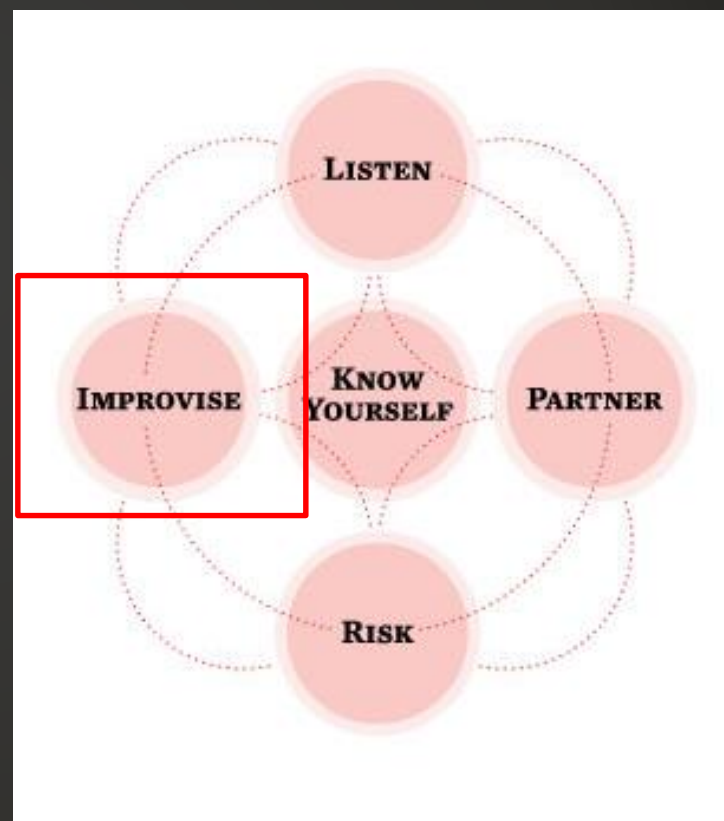
The Relationship Lab: Shaping Complex Engagements | Your Trust Landscape TrustedAdvisor

The Challenge		1. Current state: The true, root issue(s):			2. Desired state: What I envision is:		
Key Stakeholder Partnering Plan	Key stakeholders	The level at which I am spending most of my time	What he/she sees	What I wonder/ am curious about	Something I could do to improve our partnership		
	3a						
	3b						
	3c						
	3d						
Personal and Team Action Plan	4. Actions I will take personally		Intended result(s)		By when		
	4a						
	4b						
	4c						
	5. Actions I recommend WE (my MITRE team) take		Involving whom	Intended result(s)	By when		
5a							
5b							
5c							

Yes!

Know yourself ... as an improviser

Are you
habitually more
of a “Yes, and ...”
or “Yes, but ...”
kind of person?



Your Trust Landscape:

Points of view





The Challenge

1. Current state: The true, root issue(s):	2. Desired state: What I envision is:

Key Stakeholder Partnering Plan

Key stakeholders	The level at which I am spending most of my time	What he/she sees	What I wonder/ am curious about	Something I could do to improve our partnership
3a				
3b				
3c				
3d				

Personal and Team Action Plan

4. Actions I will take personally		Intended result(s)	By when
4a			
4b			
4c			
5. Actions I recommend WE (my MITRE team) take	Involving whom	Intended result(s)	By when
5a			
5b			
5c			

In trios...

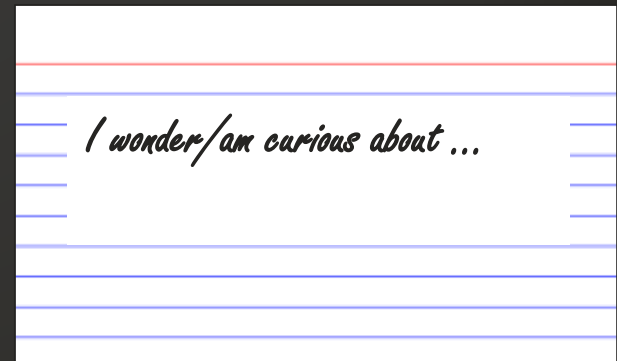
We will do 3 rounds – 10 minutes each round

You will:

- State the true root issue
- Put on your glasses and complete a series of statements *from your stakeholders point of view*

Your partners will:

- Listen and get curious
- Share insights



I wonder/am curious about ...

How do your stakeholders see the situation?

1. “My **name** is ...”
2. “My **role** is ...”
3. “What **really matters to me** is ...”
4. “From my perspective, **the issue(s)** is/are ...”
5. “What it’s like to be me **dealing with this problem** is ...”



I wonder/am curious about ...

“I can see clearly now ...”

p. 13

What do you see now
that you didn't see
this morning?

What did you learn
from the *structure* of
this exercise?



“The word *partner* has several definitions, including either of two persons dancing together. The dancing metaphor conjures up images of give and take, synchronization, graceful movement, and being in tune and in step with one another”

--*The Trusted Advisor Fieldbook*



The
Challenge

1. Current state: The true, root issue(s):	2. Desired state: What I envision is:

Key Stakeholder
Partnering Plan

Key stakeholders	The level at which I am spending most of my time	What he/she sees	What I wonder/ am curious about	Something I could do to improve our partnership
3a				
3b				
3c				
3d				

Personal and Team Action Plan

4. Actions I will take personally	Intended result(s)		By when
4a			
4b			
4c			
5. Actions I recommend WE (my MITRE team) take	Involving whom	Intended result(s)	By when
5a			
5b			
5c			

How do the key players see the situation?

1. “My **name** is ...”
2. “My **role** is ...”
3. “What **really matters to me** is ...”
4. “From my perspective, **the issue(s)** is/are ...”
5. “What it’s like to be me **dealing with this problem** is ...”



Your Trust Landscape:

Action planning



The
Challenge

1. Current state: The true, root issue(s):	2. Desired state: What I envision is:

Key Stakeholder
Partnering Plan

Key stakeholders	The level at which I am spending most of my time	What he/she sees	What I wonder/ am curious about	Something I could do to improve our partnership
3a				
3b				
3c				
3d				

Personal and Team Action Plan

4. Actions I will take personally		Intended result(s)	By when
4a			
4b			
4c			
5. Actions I recommend WE (my MITRE team) take	Involving whom	Intended result(s)	By when
5a			
5b			
5c			

Closing out, for now ...

- “Something I appreciate about you ...”
- “My wish for you, personally ...”



“Parting is such sweet sorrow”

- “My **biggest takeaway** ...”
- “One **risk** I will take ..”
- “I’m most **looking forward** to ...”

