



| Table 1 | Table 2 | Table 3 | Table 4 | Table 5 | Table 6 |
|---------|---------|----------|---------|---------|----------|
| Dannika | Darra | Andi | John | Beth | Jane |
| Cynthia | Pegine | Paula Z. | Teresa | Lori | Ector |
| Meagan | Suzanne | Hunter | Tim S. | Anthony | Caity |
| Judy | Jim | Tim M. | Phil | Gregory | Paula A. |
| Liz | | | | Sam | Angela |





Being a Trusted Advisor



Austin, Texas
USA
July 21-22, 2016

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

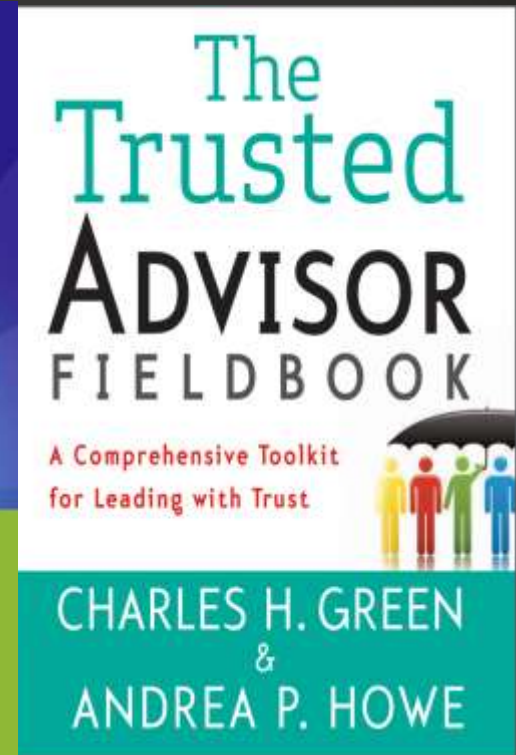
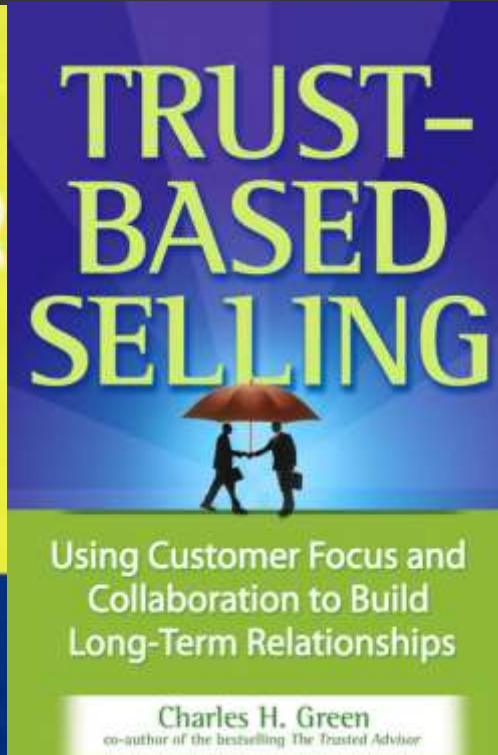
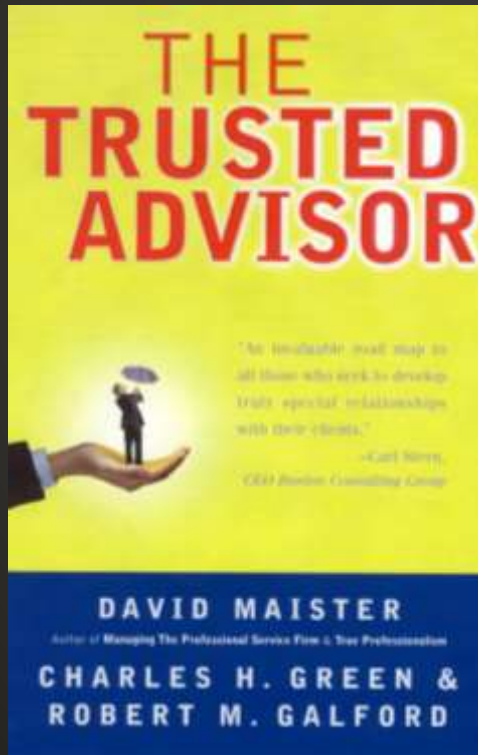
1. Name
2. Role

3. Number of
months at Q2

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. 5

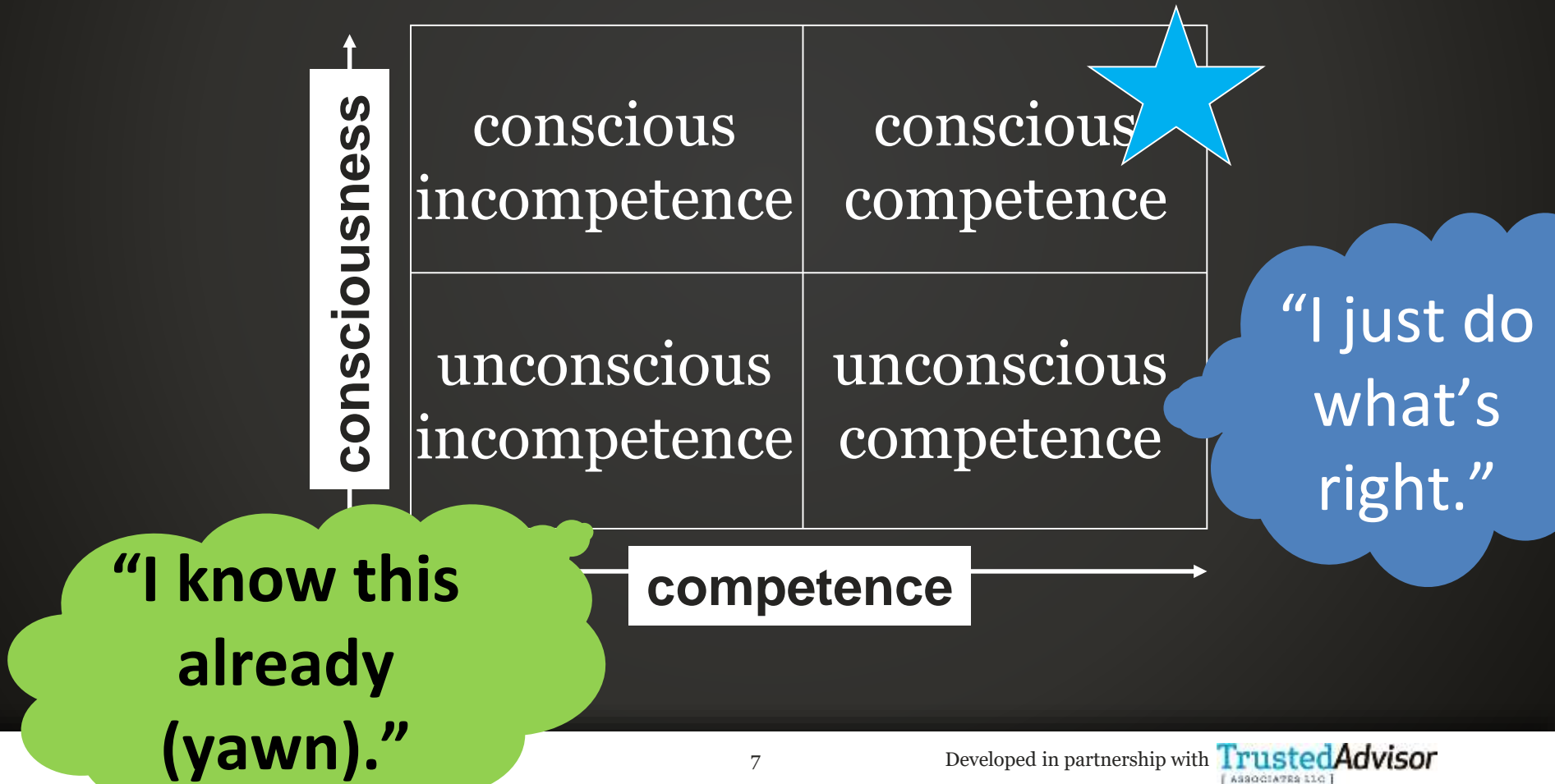
Work = enjoyable

Relationships = rewarding

Results = remarkable

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

“Mastery” is more than “really good”



We'll be covering a lot of ground

Day 1

Defining
Trust



Assessing
Trustworthiness



Being More
Influential



Day 2

Managing
Tough
Conversations



Making it
Real



Putting it All
Together



The goal: 2% for 100%

p. 6

Toward that
end, let's look
at your big
“How Do I’s” ...



What kind of environment will we create?



Defining Trust



The Trust Principles define four key values

p. 7

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

p. 8

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

Make it real: Your customer situation

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 _____.”)

p. 9

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

Who's *your* trusted advisor?

p. 11

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. 12

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

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 Travel Agent Case

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

Ideal outcome?

p. 14



Make it real: Intimacy and Self-Orientation

p. 15

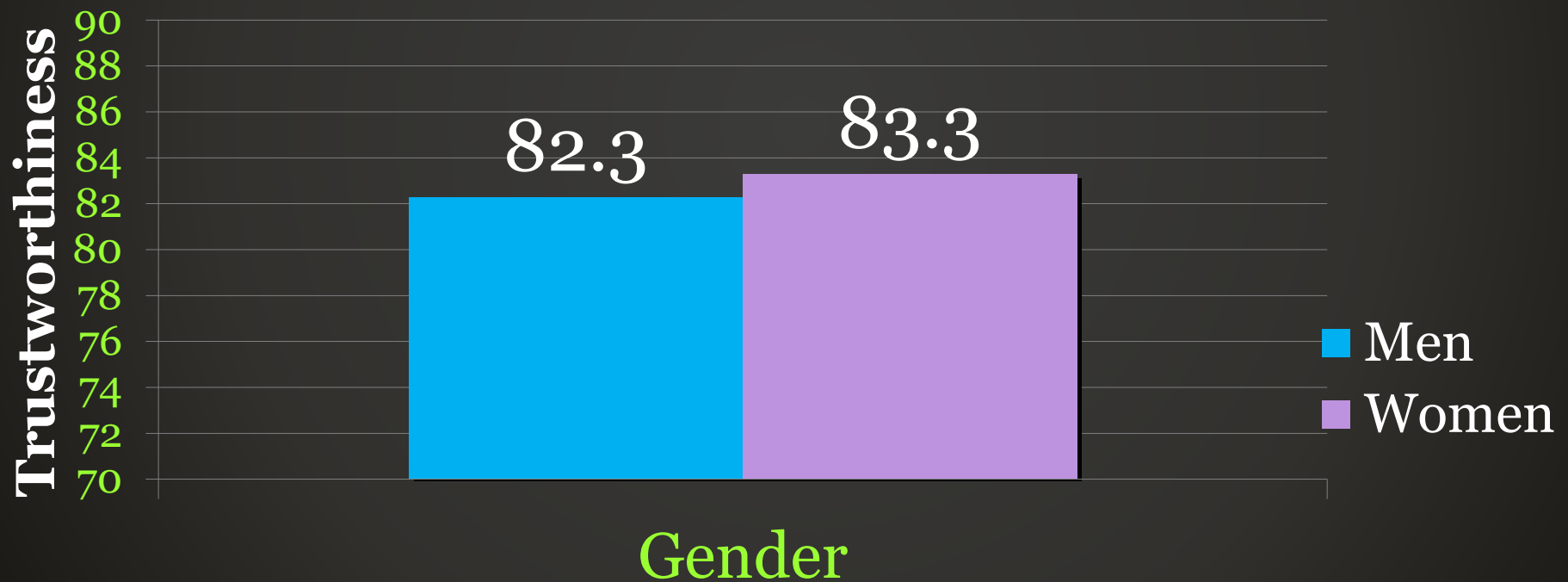
Consider your
customer situation.
What opportunities do
you see to improve
your intimacy and self-
orientation?



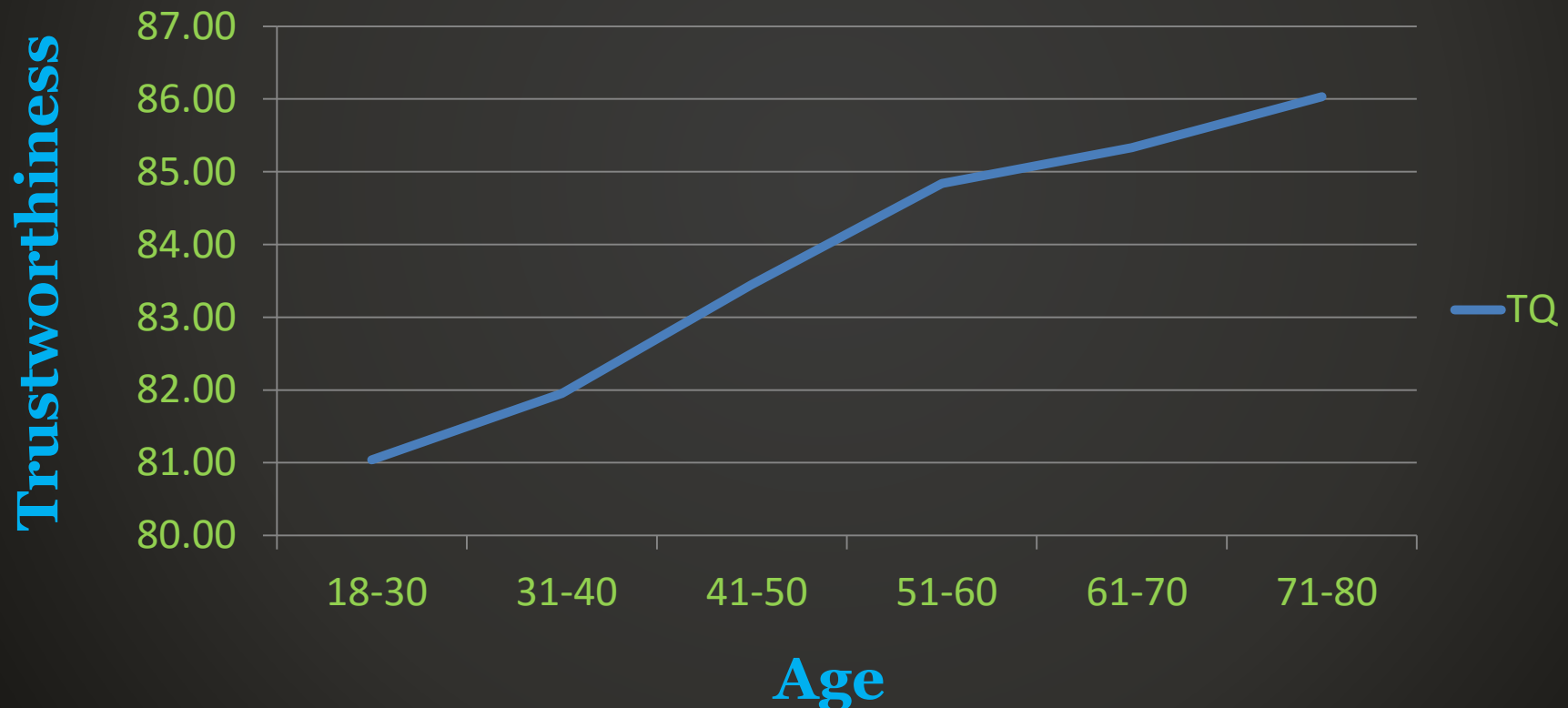


Assessing Trustworthiness

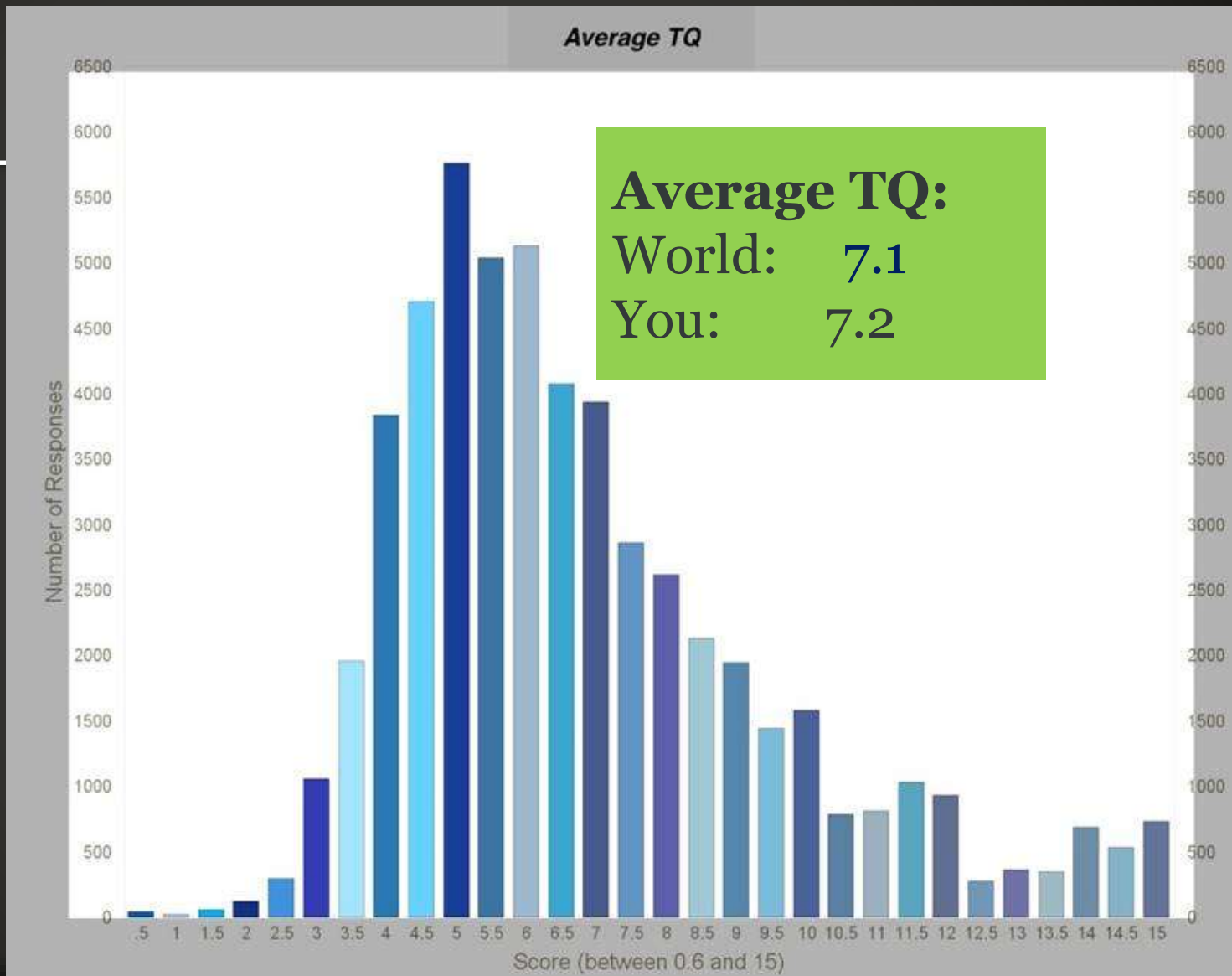
Who's more trustworthy: men or women?



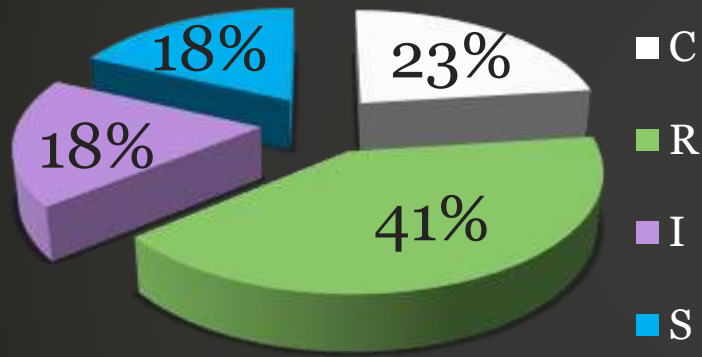
Do we get more or less trustworthy as we age?



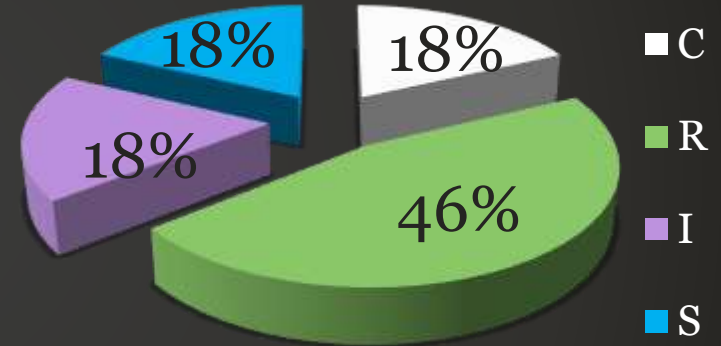
How trustworthy are *you*?



Here's how you see your strengths

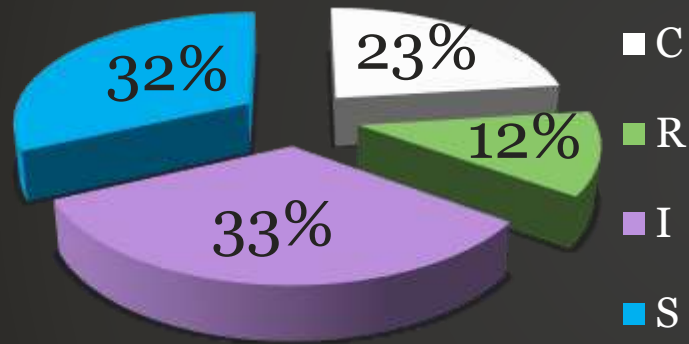


Total Population
N = 63,939

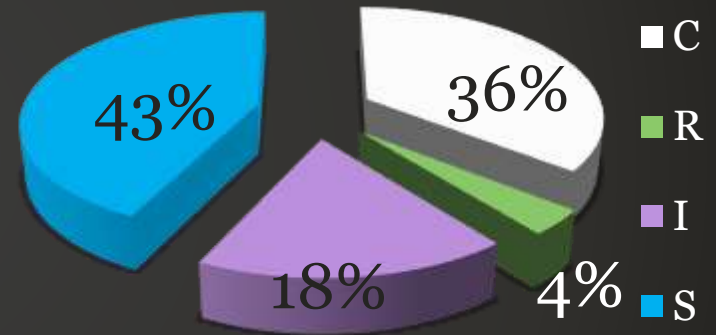


Q2
N = 24

Here's how you see your areas of opportunity



Total Population
N = 63,939



Q2
N = 24

Make it real: Your TQ

p. 16

p. 18-19

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?

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

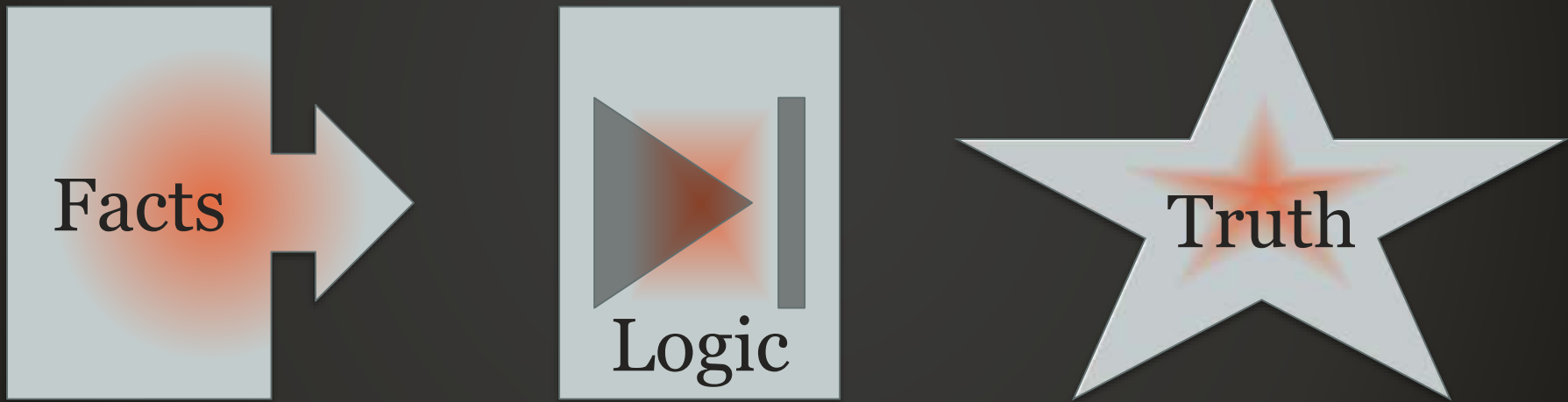
T trustworthiness
C credibility
R reliability
I intimacy
S self-orientation

Being More Influential

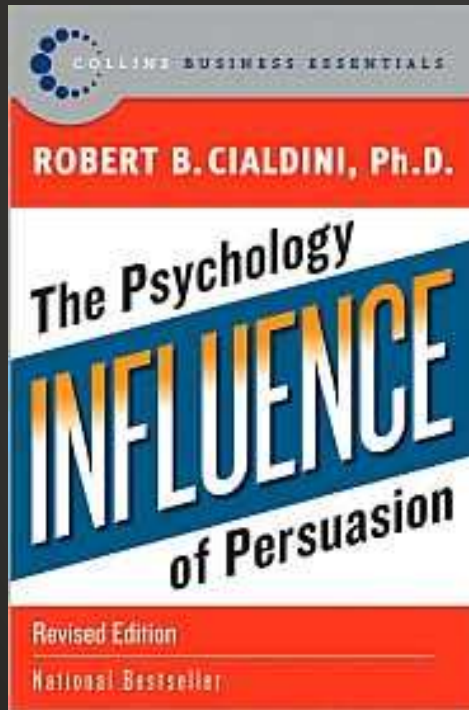


Influence is as misunderstood as trust

p. 21



What drives influence might surprise you



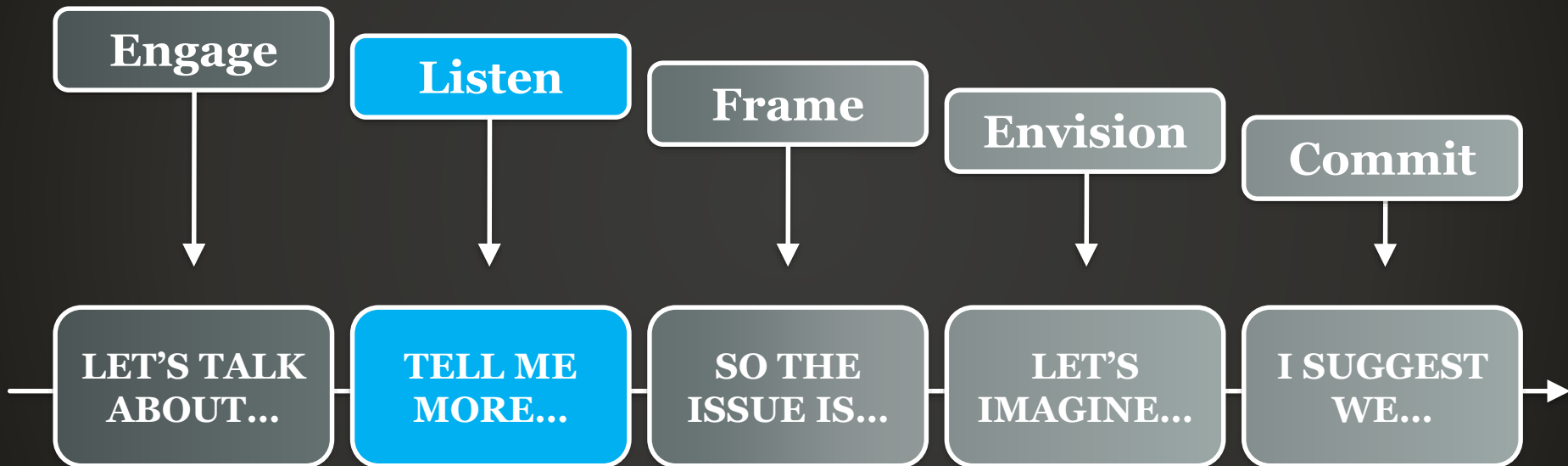
reciprocity

Trust breaks down in conversations in two key ways



Listening matters ... a lot

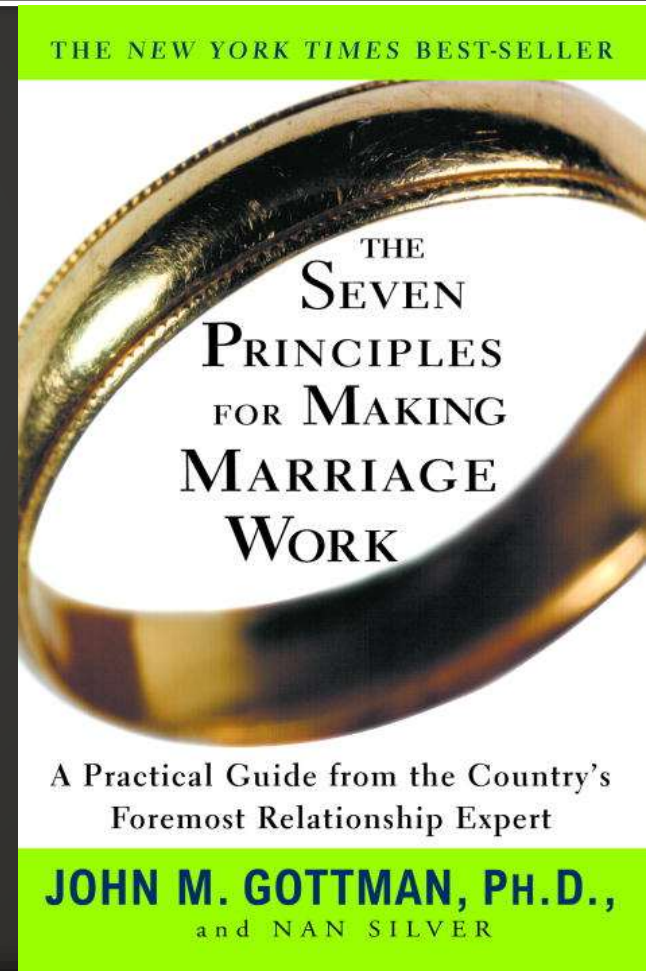
p. 22-23



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

What Empathy Sounds Like

“I don’t see value in that.”

“Sounds like we haven’t done a good job making our case.”

“That’s a tough spot to be in.”

“We’re just not sure which way to go.”

“I’m disappointed by your team’s results.”

“I’m very sorry to hear that. I’m sure that’s frustrating, to say the least.”

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

p. 24

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?



What Listening Says

The New York Times
ON THE WEB

“People often ask me how I, an American Jew, have been able to operate in the Arab/Muslim world for 20 years, and my answer to them is always the same. The secret is to be a good listener ...”

“ ... It's not just what you hear by listening that is important. It is what you say by listening that is important...”

“ ... Never underestimate how much people just want to feel that they have been heard; once you have given them that chance, they will hear you.”

Thomas Friedman

Make it real: Customer listening

p. 25

Consider your **customer situation.**

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



Make it real: Your trusted advisor toolkit

p. 2

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

There's homework!

1. Validate your Trust Temperament™
2. Be an observer
3. BONUS: empathize with someone





Welcome back.

Being a Trusted Advisor



Austin, Texas
USA
July 21-22, 2016

One word check-in

If you had to describe **how you are as we begin today** in **ONE WORD**...

... avoiding words like “good,” “fine,” and “OK” (in the interest of being more descriptive) ...

... *what word would you choose?*

How did it go?

1. Validate your Trust Temperament™
2. Be an observer
3. BONUS: empathize with someone



We're making progress

Review
Resources
Loose Ends
Trust Temperaments

Day 1

Defining
Trust



Assessing
Trustworthiness



Being More
Influential



Day 2

Managing
Tough
Conversations



Making it
Real



Putting it All
Together



Make it real: Your trusted advisor toolkit

p. 2

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



How's your
recall?

p. 28

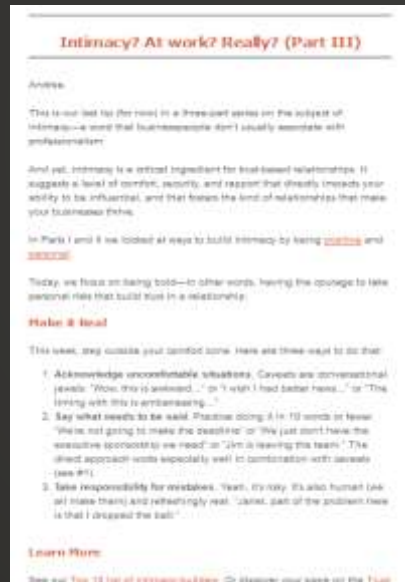
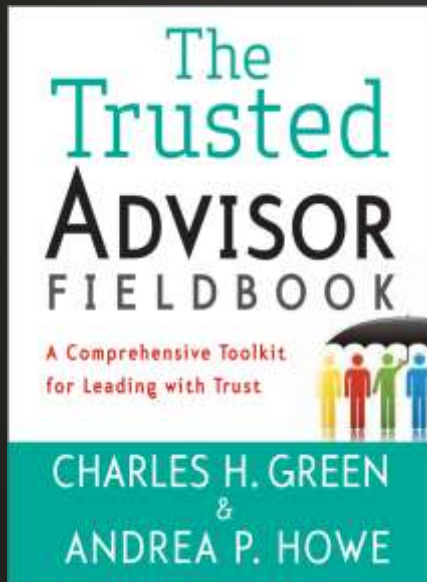
Make it real: Internal applications

Notes p. 42

How might you apply what you are learning to be trusted advisors to each other (i.e. within Q2)?



There's no shortage of resources on this topic



How are we doing?



Working with Trust Temperaments™



What's in a Temperament?

p. 29

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.

Make it real:

Your Trust Temperament

In groups by Trust Temperament™:

1. What do people appreciate about working with your TT?
2. What might frustrate them about working with your TT?
3. What would your slogan/bumper sticker/logo be?

| Trust Temperament™ | C | R | I | S |
|--------------------|---|---|---|---|
| Expert | ✓ | ✓ | | |
| Catalyst | ✓ | | ✓ | |
| Professor | ✓ | | | ✓ |
| Doer | | ✓ | ✓ | |
| Steward | | ✓ | | ✓ |
| Connector | | | ✓ | ✓ |

EXPERT (CR)

YOU'RE GREAT AT solving the hard problems.

- People trust you for your expertise and follow-through.
- You're self-governing and are able to prioritize tasks to get things done.
- You can be driven and competitive.

YOU CARE ABOUT

What others think of your work.

OTHERS SEE YOU AS

Reliable, well-informed, up-to-date, and proactive.

| | |
|---------------------------------------|---|
| BENEFIT TO YOUR ORGANIZATION | Your clear presentation of the facts and analysis, along with your informed decision-making help clients believe that your organization can be trusted. |
| DOWNSIDE | At times your objectivity can block you from taking emotional risks. Your expertise can come across as arrogance. |
| TEMPERAMENT TWINS YOU MAY KNOW | <ul style="list-style-type: none"> • Warren Buffet—investor • Alan Greenspan—economist • Christine Lagarde—Managing Director of the International Monetary Fund • Vince Lombardi—football coach |
| MOTTO | "Lead, follow, or get out of the way"—Thomas Paine |

STEWARD (RS)

YOU'RE GREAT AT not letting your ego interfere with your work.

- People can count on you to do what you say you will.
- You keep clients' interests top-of-mind.
- Your leadership comes from a willingness to serve rather than a desire to dominate.
- You have concern for the team as well as the job.

YOU CARE ABOUT

Fulfilling the mission, taking care of the organization.

OTHERS SEE YOU AS

Genuine, consistent, and dependable. They don't worry that you have a hidden or selfish agenda. They appreciate that you can see both sides of a case and think from their point of view.

| | |
|---------------------------------------|---|
| BENEFIT TO YOUR ORGANIZATION | You assume the role of caretaker of any group you are in, whether it's in your job description or not. |
| DOWNSIDE | Others may interpret your collaborative nature as a lack of personal ambition. |
| TEMPERAMENT TWINS YOU MAY KNOW | <ul style="list-style-type: none"> • Margaret Mead—anthropologist • Bono—singer/humanitarian • Morgan Freeman—actor • Steve Wozniak—co-founder of Apple Computers • Aung San Suu Kyi—Noble Peace Prize winner • Ursula Burns—Chairperson of XEROX |
| MOTTO | "Do whatever it takes to meet the mission." |

DOER (RI)

YOU'RE GREAT AT meeting deadlines and adhering to budgets.

- People feel safe with you and count on you to follow through.
- You are dependable, optimistic, friendly, and a good listener.
- You roll up your sleeves and get things done, often working behind the scenes.
- Your word is your bond.

YOU CARE ABOUT

Getting organized, getting the job done and getting others to help you.

OTHERS SEE YOU AS

The kindly drill sergeant, diplomatic and motivating. They trust your common sense. Because you're very personable, people are willing to follow your direction. People value your organization, dependability, sincerity, and predictability.

| | |
|---------------------------------------|--|
| BENEFIT TO YOUR ORGANIZATION | You motivate others to stay on task. |
| DOWNSIDE | You may focus on the task at hand at the expense of the overall goal. To increase others' trust in you, look for ways you can broaden your interest in other points of view, lowering your Self-Orientation. |
| TEMPERAMENT TWINS YOU MAY KNOW | <ul style="list-style-type: none"> • Michelle Obama—First Lady of the United States • Eleanor Roosevelt—former First Lady of the United States • Sergio Marchionne—CEO/Chairman of Fiat and Chrysler • Angela Merkel—German Chancellor |
| MOTTO | "Let's roll up our sleeves and all pitch in." |



Make it real: Your TQ (cont.)

p. 17

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.

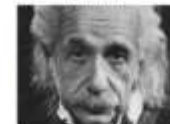
TRUSTED ADVISOR HAS BEEN FEATURED ON:



Are you **confidant** like Margaret Thatcher?



Do you lack **reliability** like Albert Einstein?



Are you **good at being convincing** like Bill Clinton?



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



© 2012-2015 Trusted Advisor Associates LLC, 8 Lugin Circle, West Orange, NJ 07092-2016. Tel: 973-898-0270, Fax: 973-898-0474

Make it real: Your Trust Temperament

<Notes>

| | How would understanding your (respective) TT's help you improve your relationship? | What action(s) will you personally take to make it better? |
|-------------------------------|--|--|
| A colleague on your team | | |
| A colleague outside your team | | |



Working with Other Trust Temperaments

| Working with: | AN EXPERT (CR) | A STEWARD (RS) | A DOER (RI) | A CONNECTOR (IS) | A CATALYST (CI) | A FIGHTER (FI) |
|-----------------------|--|--|---|---|---|---|
| | Shared C and R | Shared R | Shared R | Alert! nothing shared | Shared C | Shared C |
| | You'll align when you: | | | | | |
| AN EXPERT (CR) | Natural alignment | <ul style="list-style-type: none"> Zero in on goals, and plans for achieving them (R) Link issues to the larger purpose or mission; use "team" and "we" language (S) Use logic and facts judiciously; appreciate the "shades of grey" (S) | <ul style="list-style-type: none"> Zero in on tasks and timelines (R) Raise and respond to practical concerns (R) Listen deeply to understand all aspects of an issue/ opportunity (I) | <ul style="list-style-type: none"> Consider the human side of an issue at hand (I) Show your own humanity—e.g., where are you a little uncertain? (I) Use logic and facts judiciously; appreciate the "shades of grey" (S) | <ul style="list-style-type: none"> Start with a larger context: what improvement are you trying to make? (C) Show your own passion and enthusiasm (C, I) Brainstorm, rather than have all the answers (C, I) | <ul style="list-style-type: none"> Focus on the issue at hand (C) Keep your own opinion (C) Focus on the issue at hand (C) |
| | Watch out for your natural tendency to: | | | | | |
| | <ul style="list-style-type: none"> Be competitive/ argumentative (C) Debate for the sport of it, rather than to move an issue forward (C) Fail to consider the human side of an | <ul style="list-style-type: none"> Judge what seems like lack of ambition (C) Fail to anchor an issue in the big picture (S) Over-play your expertise; appear | <ul style="list-style-type: none"> Assume everyone loves a good debate (C) Move to action before considering all the implications (R) Dismiss "small | <ul style="list-style-type: none"> Assume everyone loves a good debate (C) Dismiss "small talk" and personal connections (I) Over-play your expertise; appear | <ul style="list-style-type: none"> Be competitive/ argumentative (C) Emphasize rules or "shoulds" (C) Stick to facts and figures, rather than ideas and implications (S) | <ul style="list-style-type: none"> Be competitive/ argumentative (C) Justify your own position (C) Dismiss "small talk" and personal connections (I) |

Try a 30-day experiment

p. 30-31

“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.

Managing Tough Conversations





Well, this is embarrassing.

Firefox is having trouble recovering your windows 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

What tough
messages do
you have to
deliver?

Name It and Claim It is as easy as 1-2-3

p. 33

1. Clarify the issue (Tip: 10 words or fewer)
2. Inventory top-of-mind 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 ...”

“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 ...”

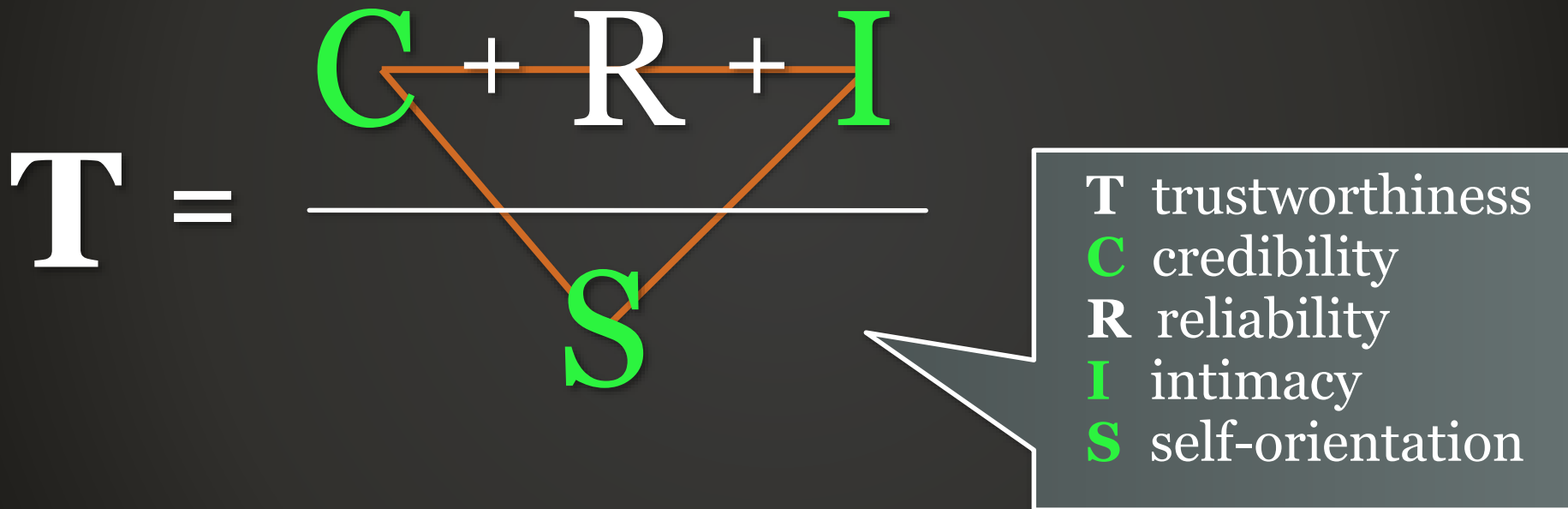
“You’re not going to like what’s coming ...”

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

p. 34

If you *were* to
Name It and
Claim It, what
would you say?
What caveats
would you use?



Make it real: Getting issues on the table

p. 37

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 the most common 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

p. 38

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 him to understand, and he is disrespectful.”

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 for all of us.”

Resources and discussions on Handshake!

We've covered a lot of ground

Day 1

Defining
Trust



Assessing
Trustworthiness



Being More
Influential

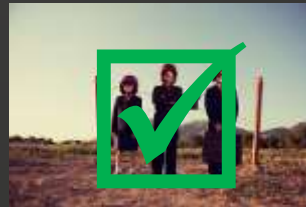


Day 2

Managing
Tough
Conversations



Making it
Real



Putting it All
Together



Make it real:

Building blocks for building trust

| | | | | | |
|------------------------------------|--|--|--|-------------------------------|--|
| Building Blocks for Building Trust | | | | TECHNIQUES Tactical | |
| | | | | Re-framing Problems | |
| | | | | Name It and Claim It | |
| | | | | Paraphrase and Empathize | |
| | | | | MODELS Behavioral | |
| | | | | The Trust Equation | The Trust Creation Process (ELFEC) |
| | | | | MINDSETS Contextual | |
| | | | | The 3 P's (trust) | The 4 Trust Principles (our values) |
| | | | | | The 4 Levels of Relationship (our value) |

Make it real

p. 2

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

Make it real

p. 39

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?

Putting It All Together



So ... how'd we do?

p. 6

Let's respond
to those big
“How Do I’s” ...



Make it real

1. Distill it ... so five years from now you remember what matters most

p. 2

2. Get into action on your customer situation

3. Create your 30-day experiment

p. 40

p. 30-31

Key Takeaways

“AHAS”

Reflect on, distill, and share your learning “ahas.” Summarize them here for easy reference.

Group call:
August 17th
3:30pm CT

STORIES

Stories bring the trust frameworks to life. What stories (yours and others’) do you want to remember most? Note them here.

Make it real

p. 41

#10



How will you choose ...

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

... to set yourself apart?