



# Trust-Based Client Engagement

## SRA | May 29 – 30, 2014



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

- A. Leave the room
- B. Answer both questions
- C. Share what I learned at school
- D. Redirect attention to the client

# Trust is personal

1. Name
2. Role
3. How many months you have been with SRA
4. An interesting tidbit or factoid that *no one in the room knows about you*



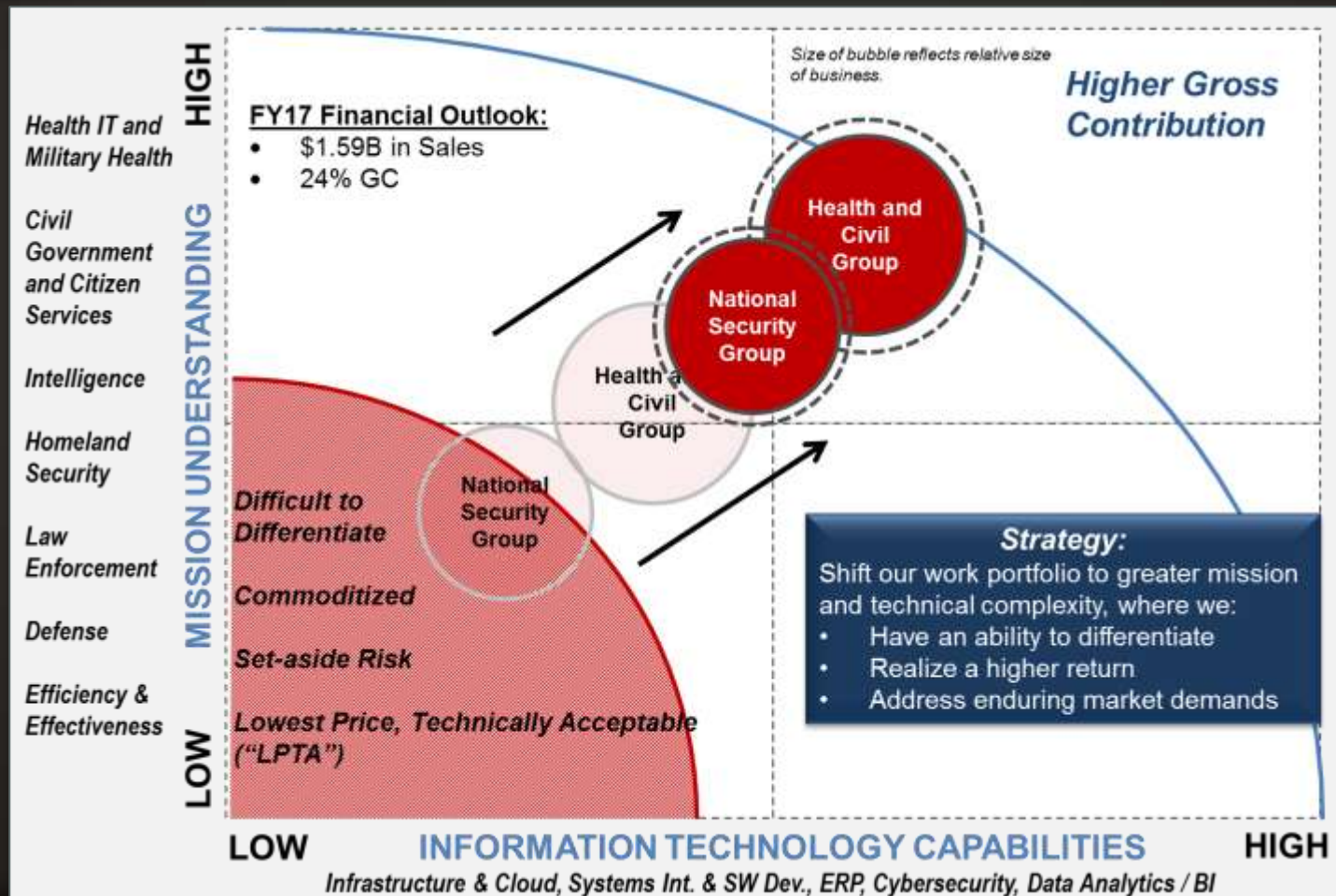
# SRA Strategic Priorities



*SRA Proprietary*

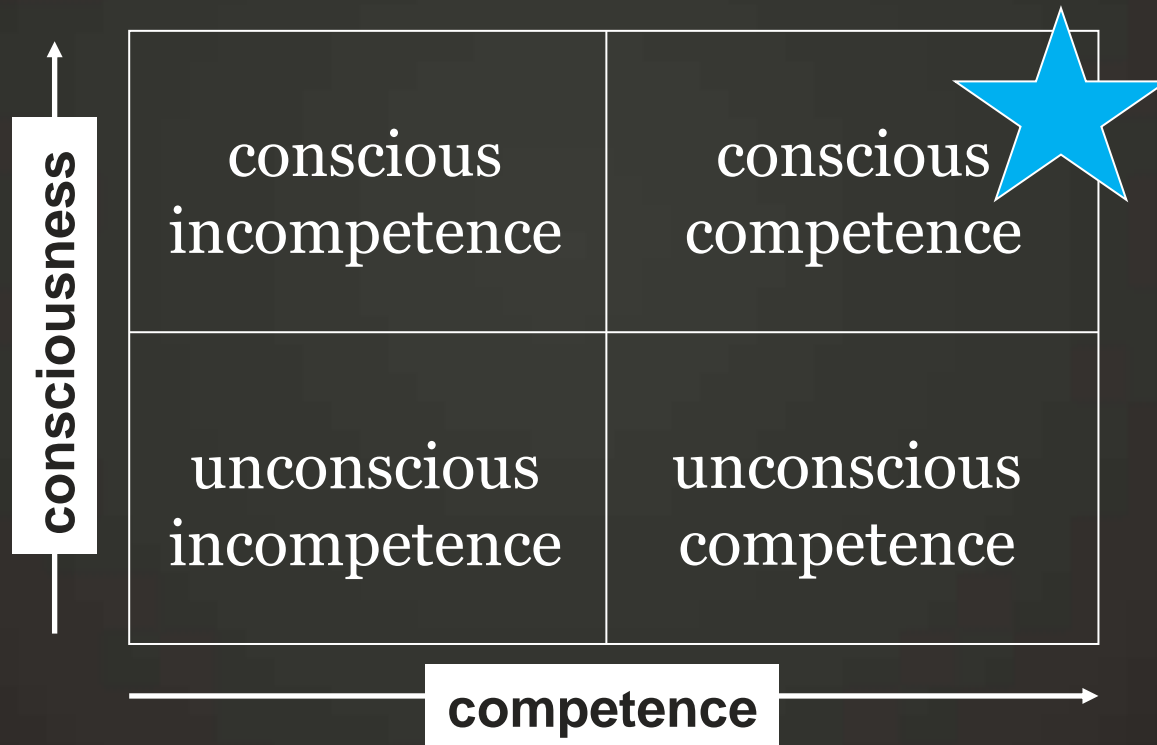


# What will it take to shift our work to high mission and technology orientation?

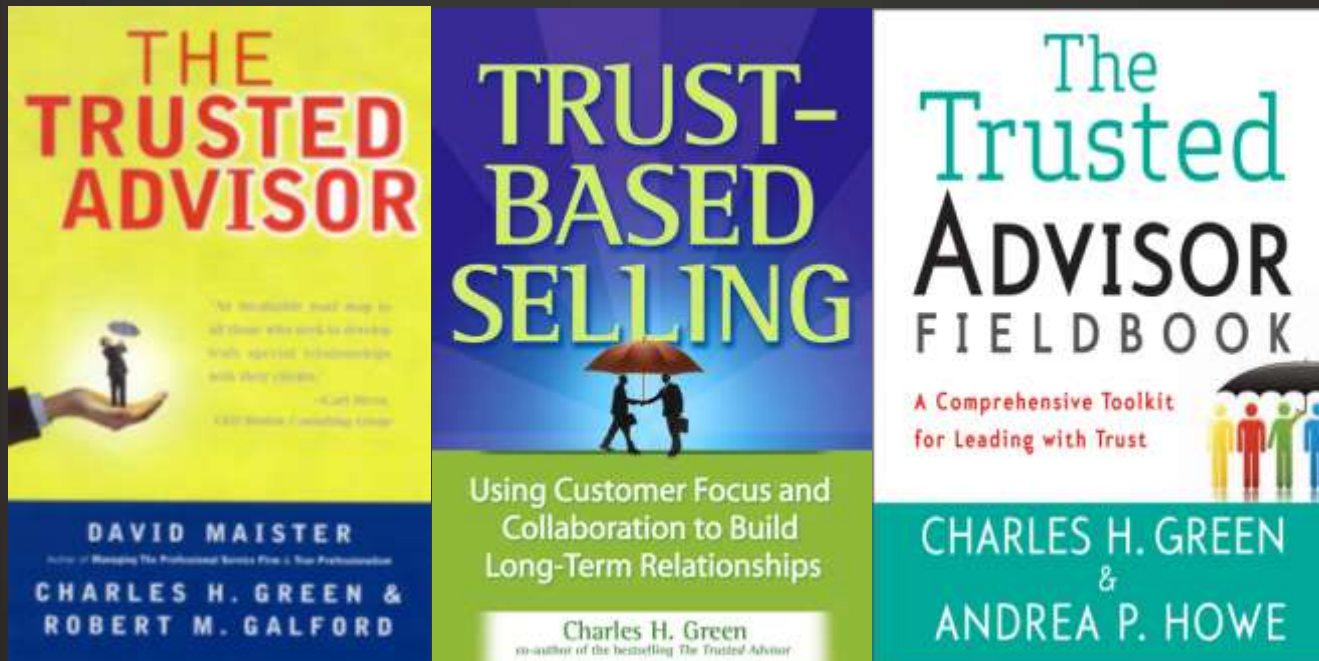


SRA Proprietary

# “Mastery” is more than “really good”



# These are our building blocks





# What's the “so what” of trust?

Work = enjoyable

Relationships = rewarding

Results = remarkable

What are the  
natural results  
when we are  
trusted by our  
clients and  
colleagues?

# We'll be covering a lot of ground

## Day 1 Day 2

Foundations  
for Success



The Best Teams  
Lens



The Execution  
Lens



The Capture  
Lens



Making it Real

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



# Foundations for Success



# How would you answer 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 should we change?
6. Why are you so much more expensive?



# Mindsets make a difference



# 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 “client challenge”:

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 **client challenge**, 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
<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



# 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 **client challenge**.

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

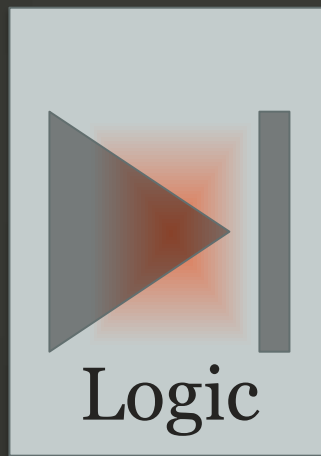
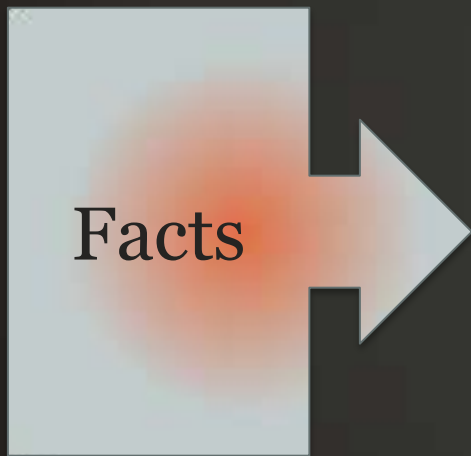




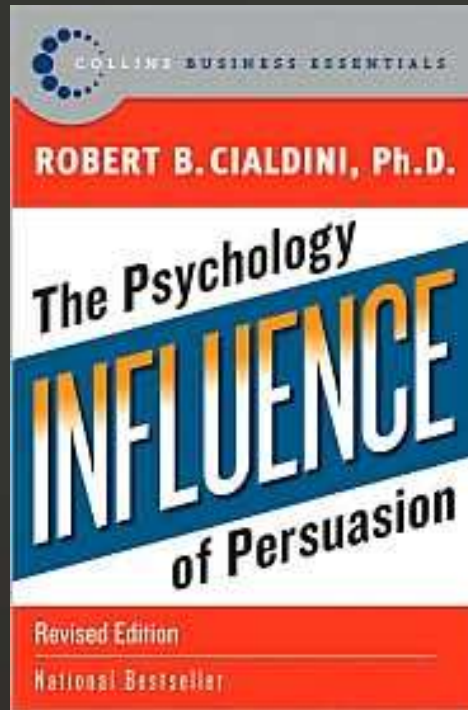
# The Execution Lens



# Influence is as misunderstood as trust



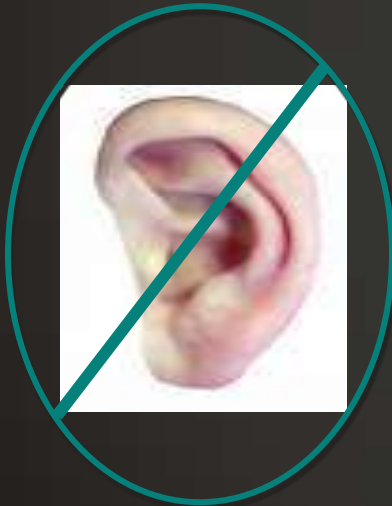
# What drives influence might surprise you



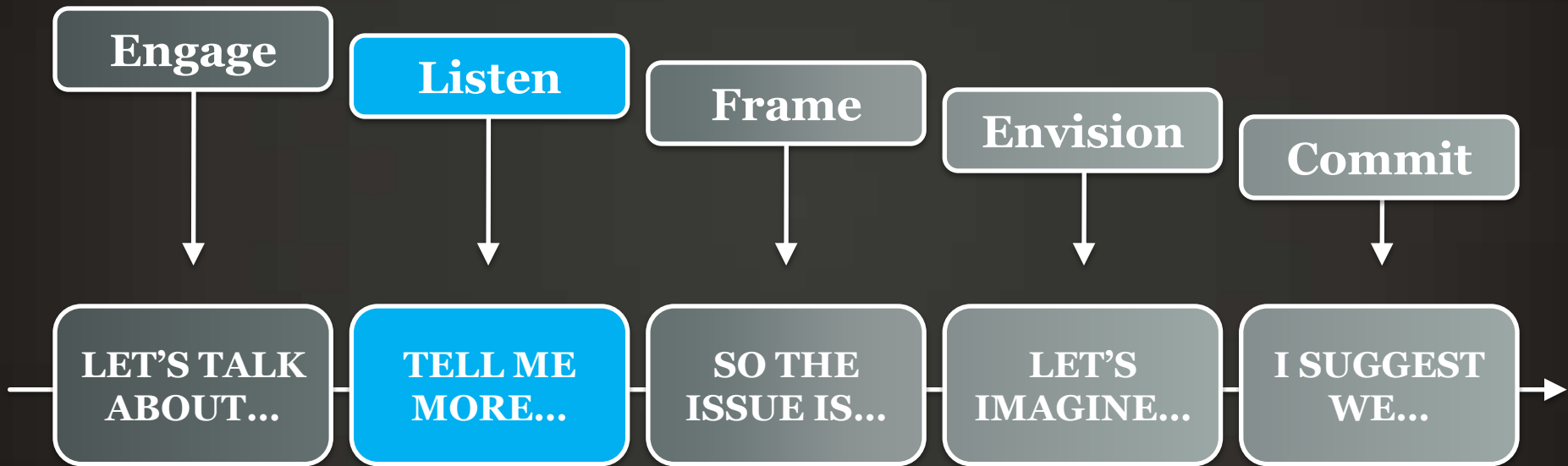
reciprocity



# Trust breaks down in conversations in two key ways



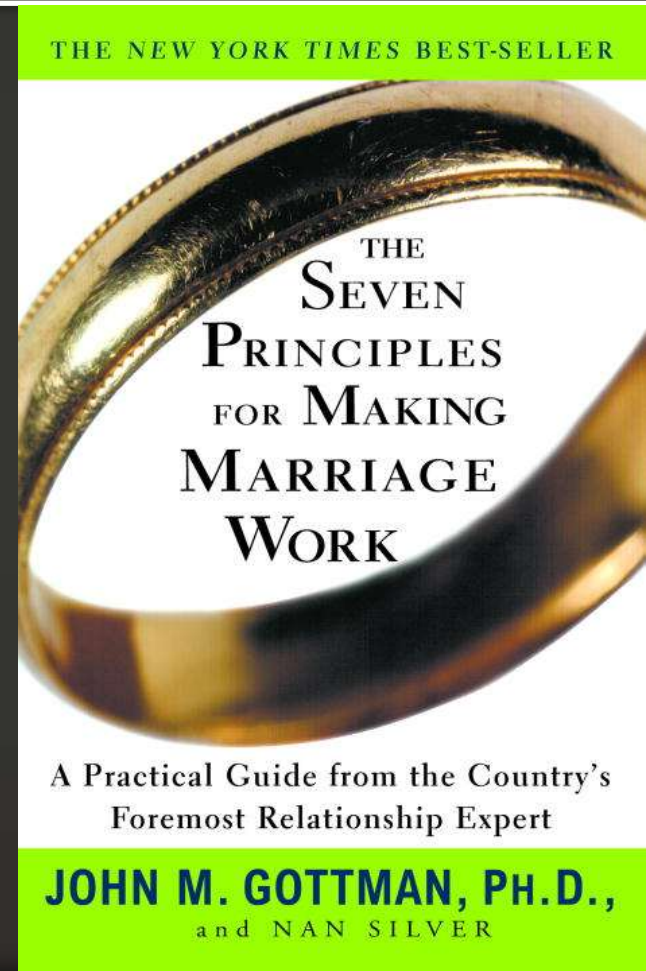
# Listening matters ... a lot



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
Client	A	B	C
Listener	B	C	A
Observer	C	A	B

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

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



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



# Let's make it real

Consider your **client challenge**.

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

What might you *listen for*?



# Like death and taxes, problems are inevitable

---

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

# Unfortunately, “my client 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 is/are/was/were (forms of the verb “to be”)

Version 1.3: Make sure your “we” includes both parties

Version 1.4: Imagine showing it to your client—will it resonate for her...and you?

# Re-framing changes the conversation

Version 1.0:

*Remove he/she/they*

Version 1.1:

*Remove “to be”*

Version 1.2:

*Make “we” inclusive*

Version 1.3:

*Test for resonance*

“He doesn’t get it, and he’s rude.”

“We can’t get his attention or his respect.”

“We can’t get his attention or his respect.”

“We have very different approaches to communication.”

Version 1.4:

“We communicate differently, and that causes frustration.”

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

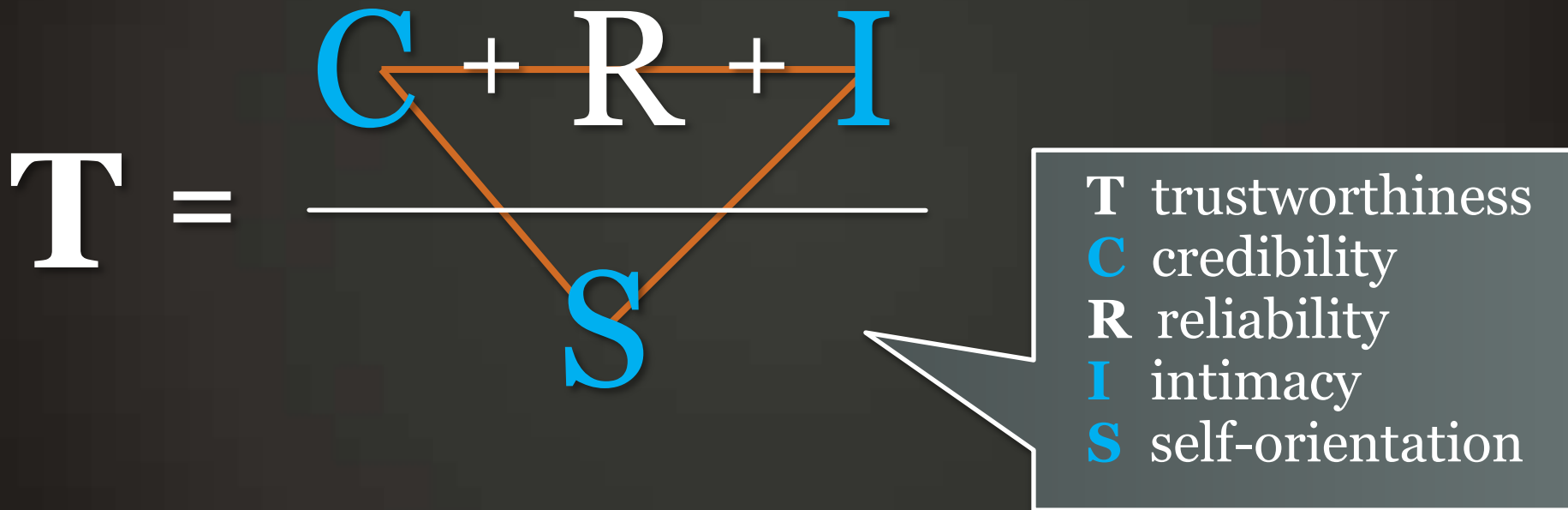
# Caveats are conversational jewels

- “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

# Let's make it real

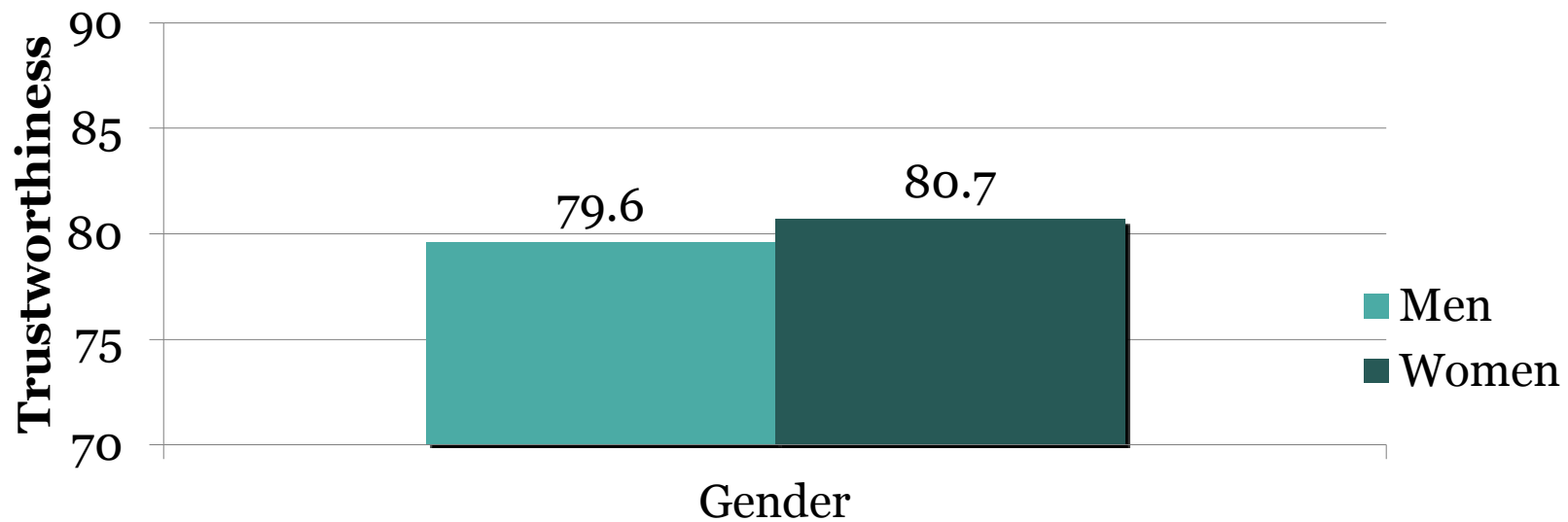
## At your tables:

1. Choose a (real) tough message to deliver
2. Articulate it in 10 words or fewer
3. Come up with *seven different caveat options* for it (three borrowed; four new)

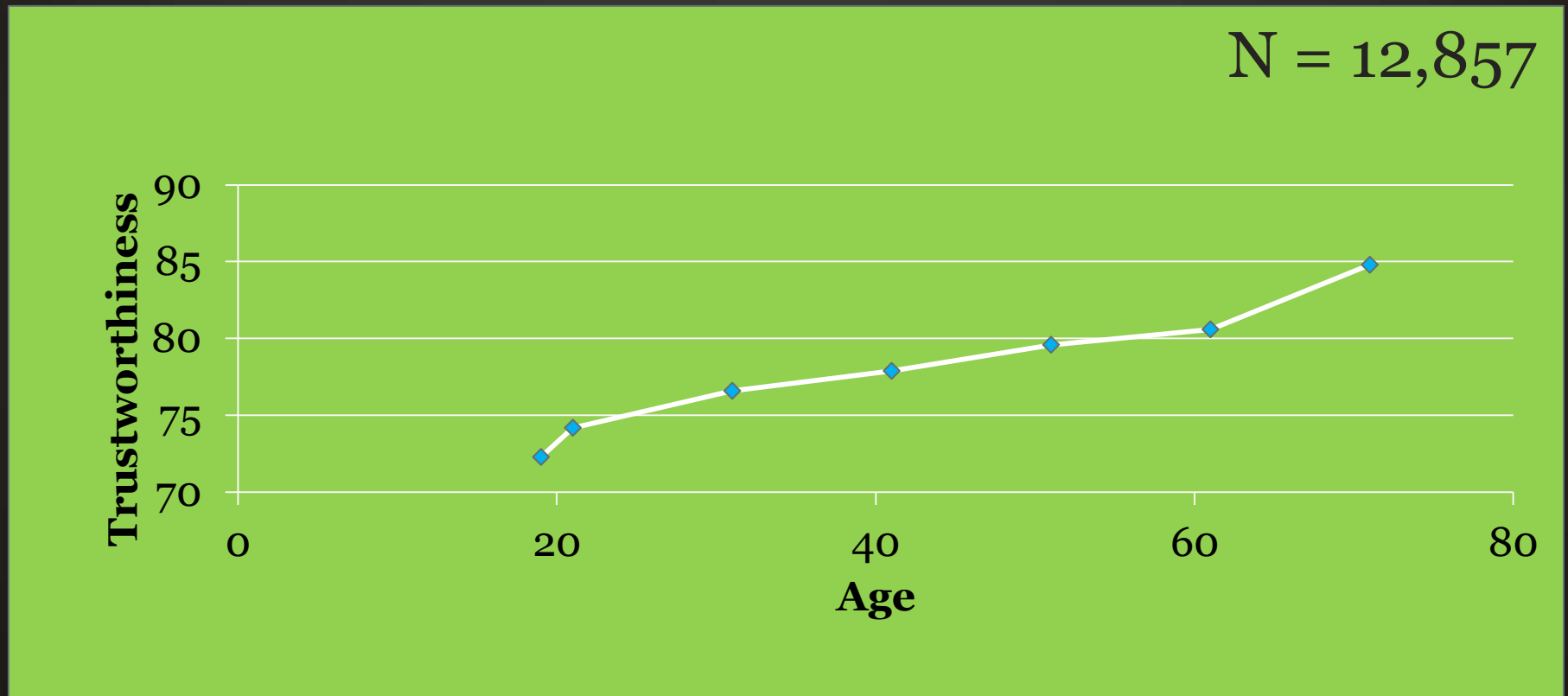


# Who's more trustworthy: men or women?

N = 12,857



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

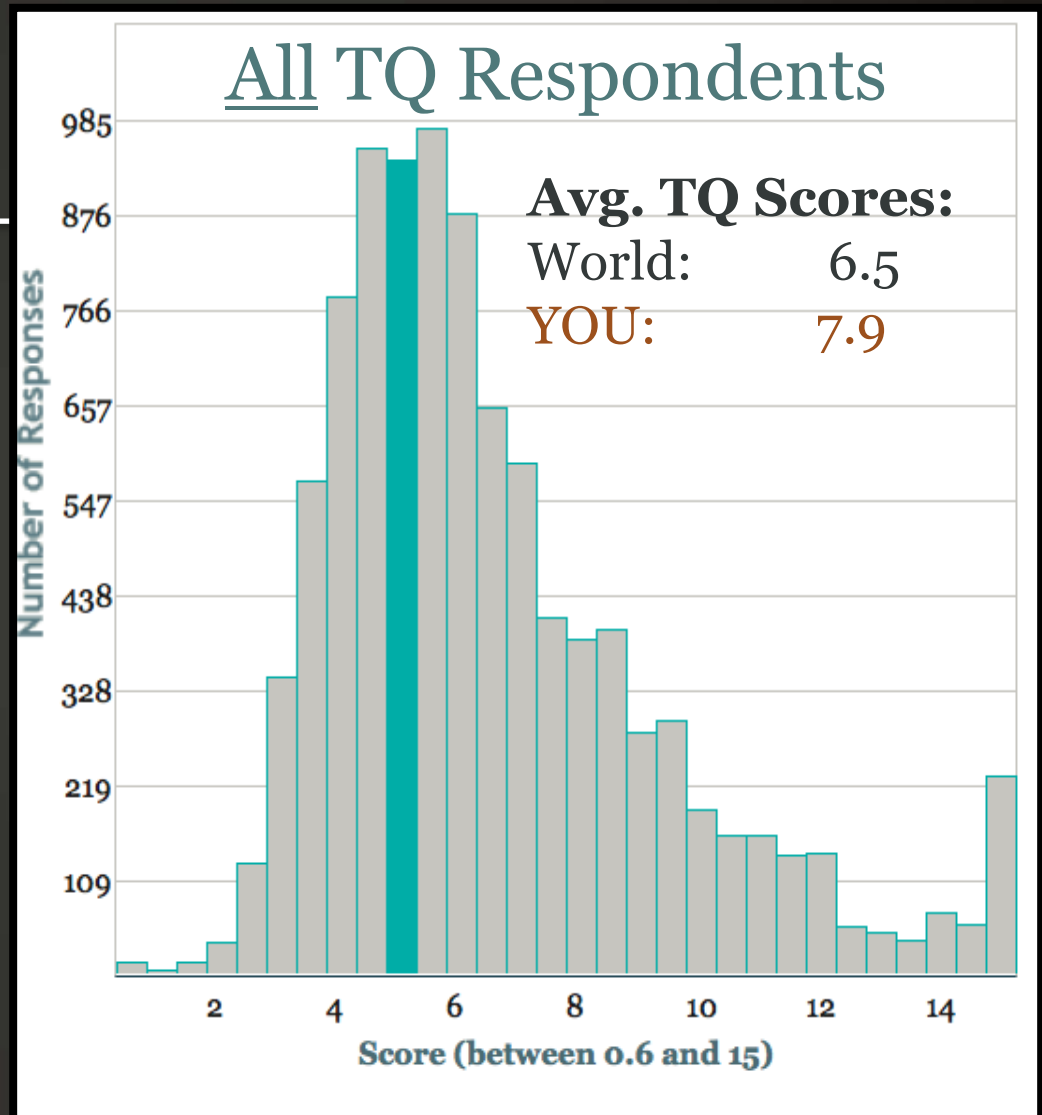




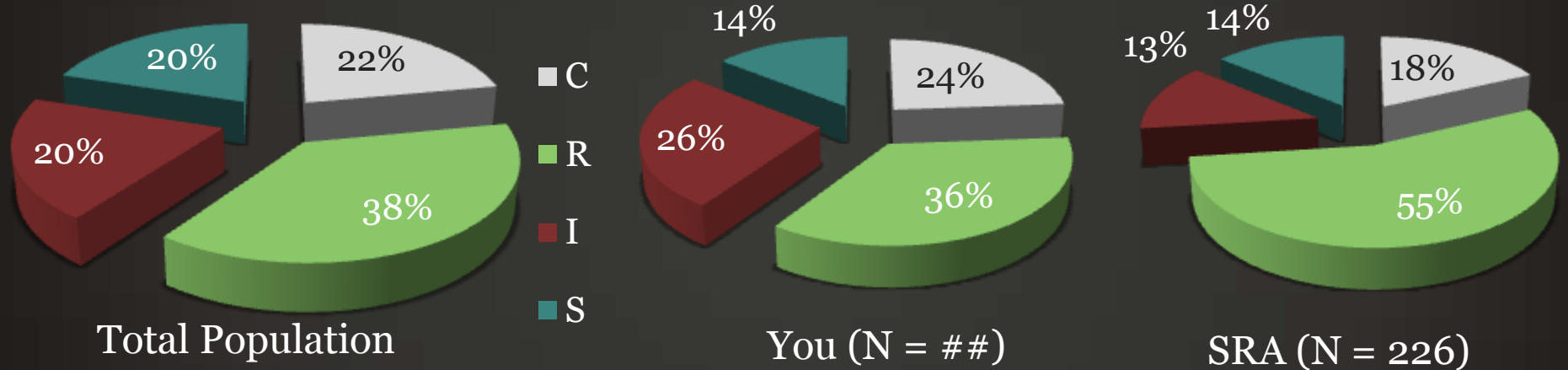
# How trustworthy are *you*?

Note: Median  
skewed left

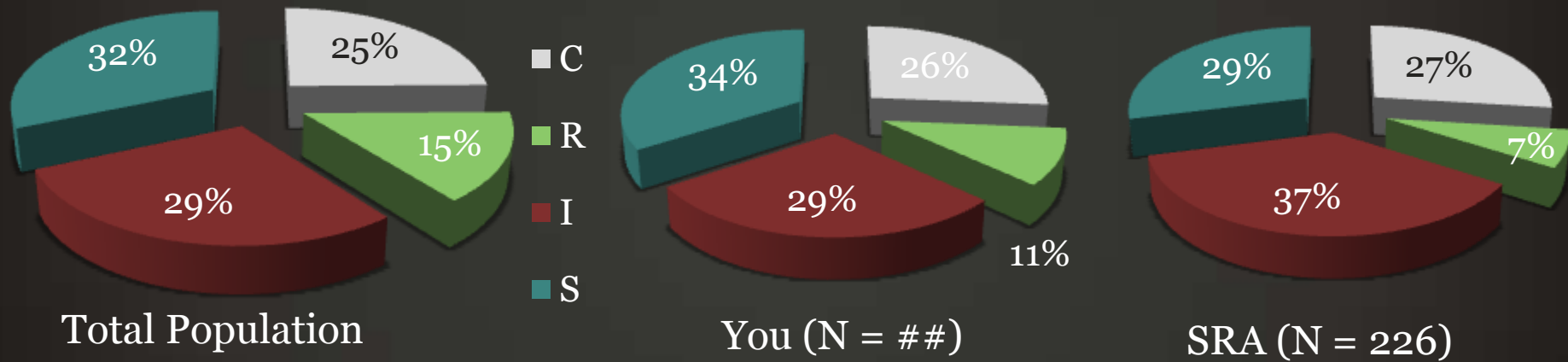
(3 x S)



# 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  
**R** reliability  
**I** intimacy  
**S** self-orientation



# Trust-Based Client Engagement

## SRA | May 29 – 30, 2014

# Let's make it real

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

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# We're making good progress

## Day 1 Day 2

Foundations  
for Success



The Best Teams  
Lens



The Execution  
Lens



The Capture  
Lens



Making it Real



# ELFEC: from good to great



# The Execution Lens



What are your key takeaways?

# The Best Teams Lens



# 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			✓	✓

# 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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# Close your eyes

1. Think about a past experience when you have been on a **best performing team**
2. What was that experience like?
3. What are the common characteristics from across our different experiences?

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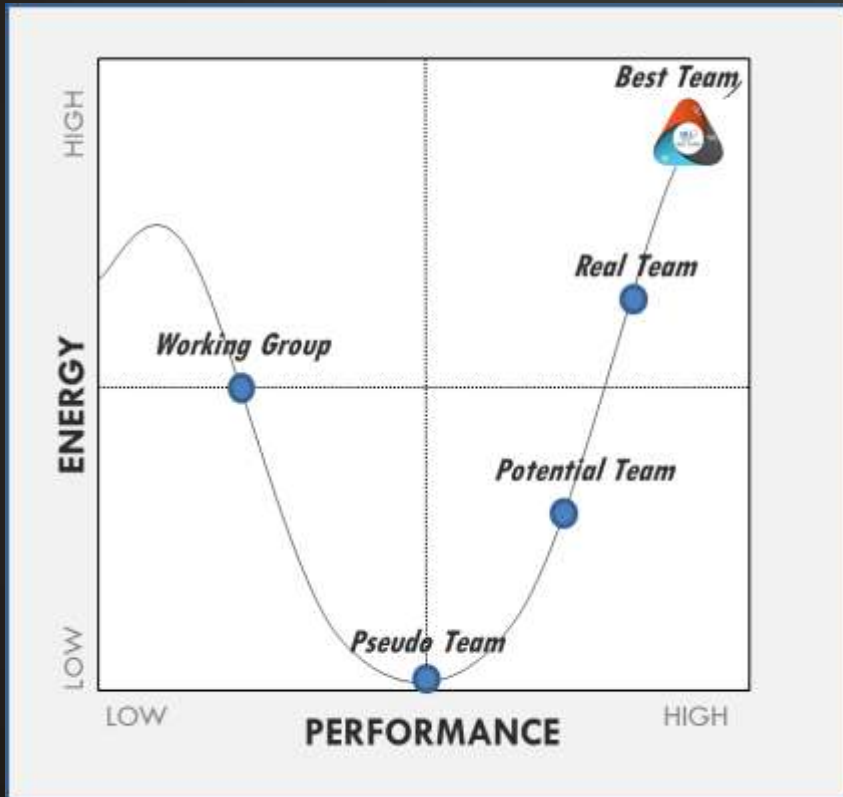


# SRA Best Teams Model



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# The journey to being a best team



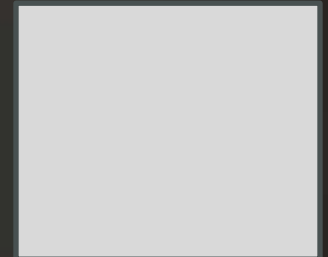
SOURCE: *The Wisdom of Teams*, Katzenbach and Smith, 2003.



- Tasks
- Operations
- Deliverables
- Status Reports
- Contract Compliance



- Feedback
- Recognition
- Lessons Learned
- Work Style
- Mindset & Behaviors
- Team/Individual Development



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## Trust-based relationships are distinctive

FOUR LEVELS OF RELATIONSHIP

	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 needs	Providing insights	Ideas	Repeat business, sole-sourced
Trust-based	Partner as a person	Understanding partner	Safe haven for tough issues	Mutually rewarding relationship

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# Making it real: team challenges



WHAT DOES YOUR  
**STYLE**  
IN THE OFFICE SAY  
ABOUT YOU?



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# Making it real: team challenges

1. Each table, at random, chooses a team challenge that might emerge on an SRA team
2. At your tables, identify the key issue(s)
3. What principles of being a trusted advisor and characteristics of Best Teams can be leveraged to address the challenge?

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# Making it (even more) real

1. Consider your “client” situation or a team-related challenge you are experiencing currently
2. What are the opportunities to apply Trusted Advisor and Best Teams to the situation?

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# The Best Teams Lens



What are your key takeaways?

# Follow-on coaching support

- Each participant in the program has access to a follow-on coaching session
- Sign up for a 30-minute slot





# The Capture Lens



# Marshmallows can teach us a lot about trustworthiness



# Where does SRA tend to “get it wrong”?

1. Building relationships only at the most senior levels
2. Only contacting clients when we need something
3. Believing we know better
4. Talking too much, not listening enough
5. Hesitating to invest before we see a clear ROI
6. All of the above
7. Other

# 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 **client challenge**.

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





# Remember which mental model is more empowering



# Olympic athletes know the value of mental prep

“Although mentally strong athletes do not always win medals due to a variety of conditions, athletes with a weak ‘mental game’ virtually never win at the biggest competitions.”

From the U.S. Olympic Committee’s Top Ten Guiding Principles for Mental Training, as reported in *Foundations of Sport and Exercise Psychology With Web Study Guide-5th Edition* by Robert Weinberg and Daniel Gould

So we'll look at “selling” from 3 perspectives

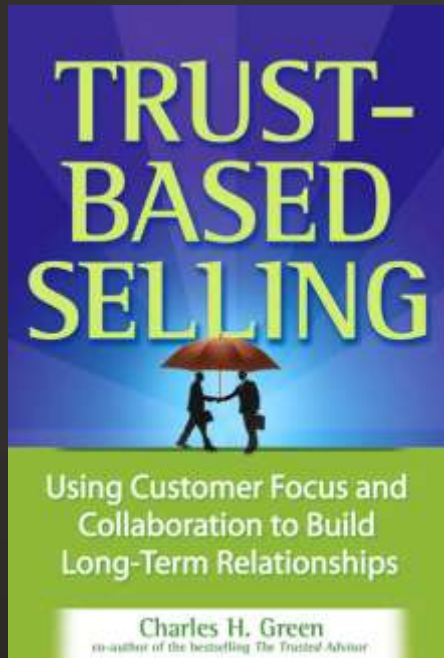




# Thoughts drive feelings which drive actions

Thoughts	Feelings	Actions
“Selling means convincing”	Cornered	Focus on your solution (only)

# 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.”

# When we're helping we feel and do things differently

Thoughts	Feelings	Actions
“Selling means helping”	Relaxed	1. Focus on all the options

Who's familiar with the  
1940's classic movie,  
Miracle on 34<sup>th</sup> Street?

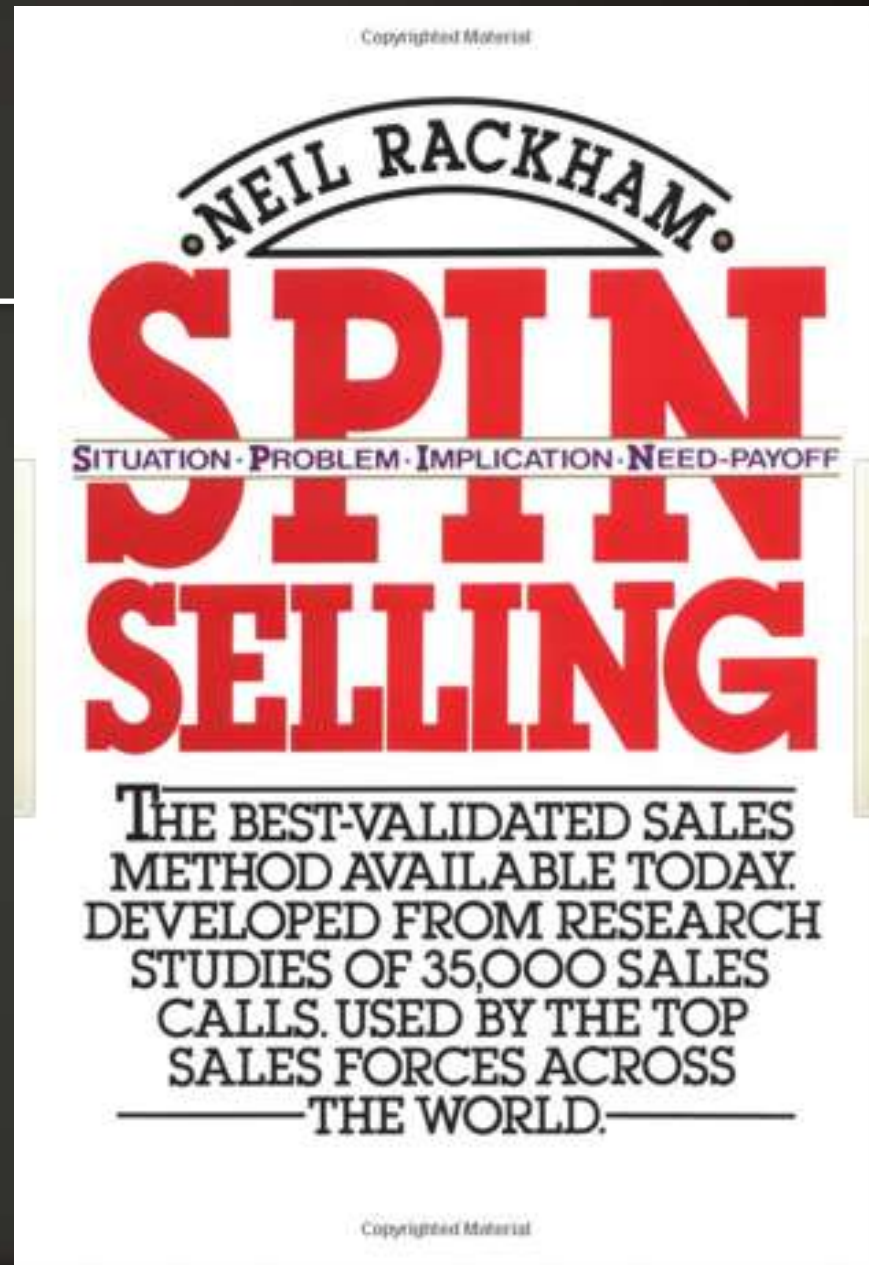


# How we define our value drives what we do

Thoughts	Feelings	Actions
“Selling means convincing”	Cornered	Focus on your solution (only)
“My clients care most about my expertise”	Pressured	Talk—a lot

# Not listening has big consequences

“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.”



Professional services are a lot like perfume,  
fine wine, and ice cream



# Doing matters, too

Thoughts	Feelings	Actions
“Selling means helping”	Relaxed	1. Focus on all the options
“My clients’ <i>experience</i> of me matters”	Motivated	2. Sell by doing



# What stands out about the Case of the Law Firm?

Listening

Client focus

A sense of theatre and willingness to take risks

→ Selling by doing



# “Selling by Doing” offers differentiation

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



# Your turn

In what ways are you  
already selling by  
doing?

How could you up  
your game?



# Awkward thoughts produce awkward action

Thoughts	Feelings	Actions
“Selling means convincing”	Cornered	Focus on your solution (only)
“My clients care most about my expertise”	Pressured	Talk—a lot
“I wish I didn’t have to [sell]”	Uncomfortable	Pretend it’s not awkward

# Caveats are conversational jewels

Thoughts	Feelings	Actions
“Selling means helping”	Relaxed	1. Focus on all the options
“My clients’ <i>experience</i> of me matters”	Motivated	2. Sell by doing
“If it seems awkward, I can say so”	Liberated	3. Use caveats

# Caveats are customizable

“At the risk of coming across as ‘salesy’ ...”

“This seems a bit awkward ...”

“I may be overstepping my bounds here ...”

# How we think about trust alters our behavior, too

Thoughts	Feelings	Actions
“Selling means convincing”	Cornered	Focus on your solution (only)
“My clients care most about my expertise”	Pressured	Talk—a lot
“I wish I didn’t have to [sell]”	Uncomfortable	Pretend it’s not awkward
“Trust takes time to build”	Resigned	Wait too long



# Trust is positively correlated to risk

Thoughts	Feelings	Actions
“Selling means helping”	Relaxed	1. Focus on all the options
“My clients’ <i>experience</i> of me matters”	Motivated	2. Sell by doing
“If it’s awkward, I can say so”	Liberated	3. Use caveats
“Risk-taking builds trust”	Empowered	4. Ask permission

# Asking permission sounds like helping

“Aria, we’re going to be working together closely for four months. We are totally committed to achieving the results we’ve defined in our project plan. Along the way, we might see opportunities to improve your business that fall outside the scope of our work. Would it be OK with you if we bring those to your attention when we see them?”

# Bottom line: There are at least four specific ways to take the “sell” out of “selling”

1. Sell the *right* solution, not your solution
2. Ask permission
3. Sell by doing
4. Use caveats

# Let's revisit 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 should we change?
6. Why are you so much more expensive?

# The Capture Lens

What are  
your key  
takeaways?



# Let's make it real

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

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



# There's one more tool in your toolkit

## 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?



# Codifying a consistent view of Client Engagement at SRA

1. What did this program clarify for you about client engagement?
2. What does good client engagement look like?
3. What else would complete the picture of client engagement?

# We've covered a lot of ground

## Day 1 Day 2

Foundations  
for Success



The Best Teams  
Lens



The Execution  
Lens



The Capture  
Lens



Making it Real

# 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.

# Let's make it real

Group call:  
June 19  
@ 11 ET

1. Define an action plan for your client challenge
2. Create your 30-day experiment



Let's make it real

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How will you choose ...

... to set yourself apart?