Trusted Advisor Associates LLC –Being Trusted Advisors

Being a Trusted Advisor – Onsite Workshop

A 1-2 day workshop to help professionals move from vendor to trusted advisor.

Who Should Attend

Accountants, lawyers, entrepreneurs, consultants, actuaries, account managers, alliance partners, financial planners, wealth managers, corporate staff from IT, HR, Legal and Finance,

Benefits of the Workshop

Clients will accept your advice readily, and seek your counsel on new issues. You gain referrals, and enjoy improved client retention. Clients agree with your statement of problems, and discussions are more constructive, less combative. You find yourself more at ease, and more effective.

Topics Covered in the Workshop

The Trust Equation $\frac{(\text{Credibility + Reliability+ Intimacy})}{\text{Self-Orientation}}$	Trust Principles -Client focus, collaboration, long-term relationship focus, transparency default
Personalized Trust Quotient Self-assessment, with analysis and action steps	Framing problem statements to increase acceptance
Trust Creation Process - Engage, Listen, Frame, Envision, Commit	How to (legitimately) increase your influence while remaining ethical and profitable
Risk and Trust - Taking intelligent risks - Name It and Claim It 4-step risk tool	Establishing trust at key relationship points - Trust on first meetings - Trust recovery
Four levels of trusted relationships	Top Ten list of trust actions
Three-level listening	

Typical Outline of a 1-day Trusted Advisor Workshop

Start	Modules
AM	**Being Trusted and Having Influence**
8:30	Introductions with a Twist: Establishing trust early
9:00	Trust Concepts: Trusting, Trustworthiness, and Trust
9:30	Deconstructing Trust: the Trust Equation, Trust Quotient
10:15	*Break*
10:45	Trust Creation Process
11:30	Video: Marino Snack Foods
12:00	*Lunch*
1:00	Getting Your Advice Taken: the Nature of Influence
1:30	The Travel Agent: Role-Play Advisory Exercise
2:15	3-Level Listening Exercise
3:00	*Break*
3:15	Socially Acceptable Risk-taking: Name It and Claim It
4:00	Principles-based Management: The Case of the Staffing Assignment
4:45	Take-aways, Top Ten List
5:30	End

Take-Away Responses from Past Attendees

Treat people as they would want to be treated	Frame without blame
It's OK to talk about wants, not just needs	Don't jump too soon to solutions
It's about the client, not me	Listening is an active process
It's arrogant to tell the client what the agenda is without them being involved in it	Small personal risks now mitigate big risk later
Client focus is personal, starts with me	The truth is the easiest version to remember
Talk about whatever's on their mind, not yours	Be prepared to take the lead in risk, honesty
Saying you don't know helps credibility	Let the client do 90% of the talking
Self-focus is more about fear than greed	Prep thoroughly; then be willing to change
Intentions matter: clients can tell	Trust goes beyond win-win
Stories work	If I'm trying to control the client, I'm wrong
Have confidence—you've got a right to be where you are	I must earn the right to "be right," i.e. to offer recommendations
Think from the client's perspective	Clients want to know the limits of your knowledge, not its extent
Everybody's favorite subject is themselves	It's not about me

Diagnostics

The Trust Quotient Self-assessment is recommended for participants in the Being Trusted Advisors workshop. It takes 5 minutes to fill out online, and detailed results are available instantly. Individual results are strictly private, but the data are used to create a group profile, which can be compared with the large database of over 25,000 past assessment users.

Sustainment

Even the very best workshops suffer from a rapid learning fall-off post session, when people get back to their normal work environments. Two powerful ways to protect your training investment are Trust-in-Time Coaching, and the Trust Equation Video series.

> **Trust-in-time coaching**. Participants reach out to coaches only when *they* have a particular issue with their situation. Trusted Advisor Associates coaches respond quickly, usually within hours; discussions last only as long as necessary to address the issue at hand and the most trust-appropriate ways of dealing with it. The result is rifle-shot, efficient, effective coaching delivered only when and where it's needed, by trust experts.
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> **Trust Equation Video series**. A 15-module series of 3-4 minute video clips, distributed one per week to all participants, means participants get a weekly reminder of key concepts from the program. Clips are short, content-rich, and professionally produced to maximize attention from users.