



The Trusted Advisor

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What's New?

The terms "trust" and "advisor" are seemingly small words, but they have meanings with layers and complexities.

The trust formula of credibility, reliability, intimacy and self-orientation provides a neat summary for the benefits and application of effective inter-personal skills.

Perspectives on Trust

3 basic skills that a Trusted Advisor needs:

- Earning Trust
- Building Relationships
- Giving Advice Effectively

Why strive to be a Trusted Advisor?

The more your clients trust you, the more they will:

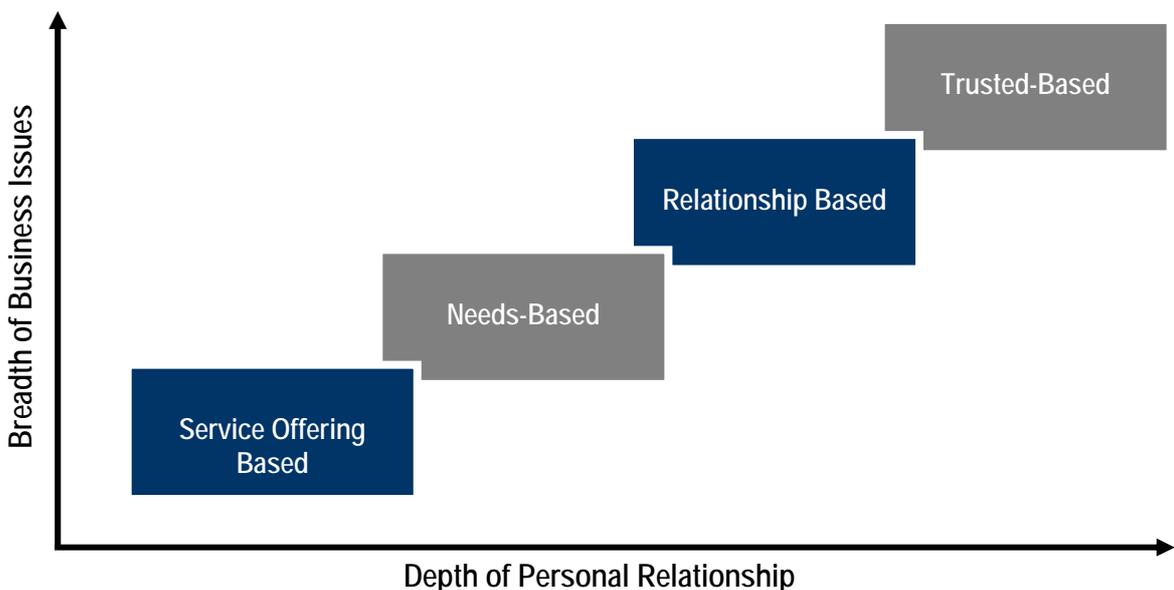
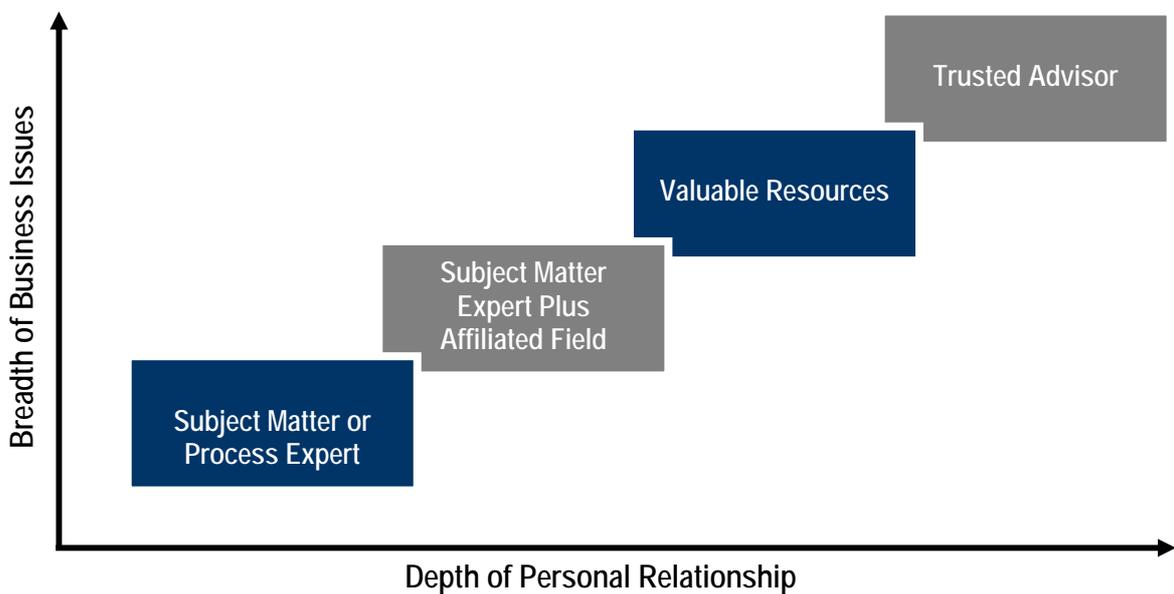
- Reach for your advice
- Be inclined to accept and act on your recommendations
- Bring you in on more advanced, complex, strategic issues
- Share more information that helps you to help them, and improves the quality of services
- Lower the level of stress in your interactions
- Give you the benefit of the doubt
- Forgive you when you make a mistake
- Protect you when you need it
- Warn you of the dangers you might avoid
- Involve you early on when their issues begin to form, rather than later in the process

Trusted Advisors share the following characteristics from a client perspective:

- Are consistent, we can depend on them
- Don't try to force things on us
- Help us think things through (it's our decision)

- Don't substitute their judgement for ours
- Help us *think* and separate our logic from our emotion
- Don't pull their punches (we can rely on them to tell us the truth)
- Give us reasoning (help us think) not just their conclusions
- Challenge our assumptions (help us uncover the false assumptions we've been working under)
- Make us feel comfortable and casual personally (but they take the issues seriously)
- Act like a real person, not someone in a role
- Are reliably on our side and always seem to have our interests at heart
- Have a sense of humour to diffuse (our) tension in tough situations

If you want your client to treat you as a Trusted Advisor, then you must meet as many of the "tests" on the list as possible.



Ten Attributes of Trusted Advisors

1. Have a predilection to focus on the client, rather than themselves. They have:
 - enough self confidence to listen without pre-judging
 - enough curiosity to inquire without supposing an answer
 - willingness to see the clients co-equal in a joint journey
 - enough ego strength to subordinate their own ego
2. Focus on the client as an individual, not as a person fulfilling a role
3. Believe that a continued focus on problem definition and resolution is more important than technical or content mastery
4. Show a strong "competitive" drive aimed not at competitors, but constantly at finding new ways to be of greater service to the client
5. Consistently focus on doing the next right thing, rather than on aiming for specific outcomes
6. Are motivated more by an internalised drive to do the right thing than by their own organisation's rewards or dynamics
7. View methodologies, models, techniques and business processes as means to an end. They are useful if they work, and are to be discarded if they don't, the test as effectiveness for *this* client
8. Believe that success in client relationships is tied to the accumulation of quality experiences. As a result, they seek out (rather than avoid) client-contact experiences, and take personal risks with clients rather than avoid them
9. Believe that both selling and serving are aspects of professionalism. Both are about providing to clients that you are dedicated to helping them with their issues
10. Believe that there is a distinction between a business life and a private life, but that both lives are very personal. They recognise that refined skills in dealing with people are critical in business and personal life; the two worlds are often work alike that they are different, and for some, they overlap to an extraordinary event

Giving Advice

Many professionals approach the task of giving advice as if it were an objective, rational exercise based on their technical knowledge and expertise. But advice giving is almost never an exclusively logical process. Rather it is almost always an emotional "duet" played between the advice giver and the client. If you can't learn to recognise, deal with, and respond to client emotions, you will never be an effective advisor.

It's not enough for a professional to be *right*. An advisor's job is to be *helpful*.

Clients frequently want someone who will take away their worries and absorb all their hassles.

Too often they encounter professionals who add to their worries and create extra headaches, forcing them to confront things they would rather ignore.

Since clients are often anxious and uncertain they are, above all, looking for someone who will provide reassurance, calm their fears and inspire confidence.

Dealing with client politics – effective advice requires an ability to suppress one's own ego and emotional needs. The most effective way to influence a client is to help the person feel that the solution was (to a large extent) their idea:

1. Give them their options
2. Give them an education about the options (including enough discussion for them to consider each option in depth)
3. Give them a recommendation
4. Let them choose

Building Relationships

Key principles of relationship building:

1. Go first – the person you are influencing must visibly perceive that you are willing to be the first one to make an investment in the relationship, in order to earn and deserve the relationship
2. Illustrate, don't tell – be very prepared and demonstrate convincingly
3. Listen for what's different, not for what's familiar – as you talk to clients, ask yourself what makes this person different from other clients. What does that mean for what I should say and how I should behave? Create situations where they will tell you more about their issues, concerns and needs
4. Be sure your advice is being sought – develop the skills and behaviour patterns that ensure that you provide affirmation, support, approval and appreciation along with your advice – learn to hold back from saying "I know how to solve your problem"
5. Earn the right to offer advice – understand the situation, understand how the client feels about it, convince the client that we understand the situation and how they feel about it
6. Keep asking – ask a lot of questions, shut up and listen
7. Say what you mean – never assume that the other person is a mind reader
8. When you need help, ask for it – anyone who tries to appear omnipotent, an individual with all the answers, is more likely to evoke precisely the opposite response ("Who is this guy trying to kid?"). Giving advice is a duet, not a solo performance
9. Show an interest in the person – keep them talking about themselves, learn as much as possible about the person
10. Use compliments, not flattery – be specific enough to make sure the compliment is not puffery
11. Show appreciation – expressing appropriate appreciation goes a long way in cementing a relationship

The Structure of Trust Building

The Trust Equation

Winning trust requires that you do well on all four dimensions (in the client's eyes).

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

- T = Trustworthiness
- C = Credibility
- R = Reliability
- I = Intimacy
- S = Self-Orientation

Why Professionals Jump to Action Too Soon (Chapter 15)

1. The human tendency to focus on ourselves
2. The belief that we're selling only content
3. The desire for tangibility
4. The search for validation

Common Fears (Chapter 15)

1. Not having the answer
2. Not being able to get the right answer quickly
3. Having the wrong answer
4. Committing some social faux pas
5. Looking confused
6. Not knowing how to respond
7. Having missed some information
8. Revealing some ignorance
9. Misdiagnosing

Dealing with Different Client Types (Chapter 16)

1. Work in advance on what is different about this client, and what might be different about you in situation:
 - are there any topics I should avoid because they are too delicate to discuss in a large forum?
 - are there any topics on which the views of your colleagues are divided?
 - where are we likely to encounter the most resistance?
 - do you have initiatives already going on that might interact with the discussion of this one?
2. As you look at a client, force yourself to ask three questions:
 - what is the client's prevailing personal motivation?
 - what is their personality?
 - how does the state of their organisation affect their worldview?
3. When thinking about a client's prevailing personal motivation, which of the following comes first?
 - the need to excel?
 - the need to take action and achieve results?
 - the need to understand and analyse before deciding?
 - the need to drive consensus?
4. Figure out why you might truly like this client as a person.
5. Use the Trust Equation.