

The Trusted ADVISOR FIELDBOOK

A Comprehensive Toolkit
for Leading with Trust



CHARLES H. GREEN
&
ANDREA P. HOWE

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Praise for *The Trusted Advisor Fieldbook*

“The groundbreaking book *The Trusted Advisor* has been hugely influential. Now, Charles Green and Andrea Howe have taken the ideas further and fleshed them out with a wealth of practical advice. For anyone whose business is based upon trust (and what business isn’t) this book is essential reading.”

—Neil Rackham, author of *SPIN Selling*

“Trust will always be an important part of business (and life!), but Charles Green and Andrea Howe have put this book in your hands at the most important time. Get into this book, absorb the lessons, then live them. Your business might depend on it.”

—Chris Brogan, president, Human Business Works,
coauthor of *Trust Agents*

“There are few who dispute the value of increasing trust. The question always comes down to ‘how?’ This book offers practical, hands-on advice on how to build trust with others. It’s clear the authors have years of experience on the topic. They provide tremendous insight into an increasingly important attribute of the twenty-first century workplace.”

—Ross Smith, Director of Test, Microsoft Office Lync

“Charles and Andrea have dramatically changed the way consultants in my unit think about relationships. They have introduced a new vocabulary, mental models, and behaviors. I am confident that their *Trusted Advisor Fieldbook* will further accelerate the growth of our talent with this easy to use and comprehensive set of tools, models, and exercises. I

know I too will be referencing the Fieldbook on a regular basis to reflect and hone my consulting skills.”

—Leif Ulstrup, CSC, President, Federal Consulting Practice

“Charles Green has spent much of his business career applying his considerable intellect to the science and discipline of trust. This understanding is combined with practical methods in *The Trusted Advisor Fieldbook*. These ideas and techniques have transformed the way I and our company approach prospects, clients, and work.”

—Michael Colacino, President, Studley

“Charles and Andrea cut to the chase on trust—the one thing you can’t lead without. They have provided us with a hands-on, state-of-the-art look at building trust, which is the essential component for becoming valued leaders to our teams and true business partners with our clients.”

—Gary S. Jones, Chief Human Resources Officer, Grizzard
Communications Group

The Trusted Advisor Fieldbook

A Comprehensive Toolkit
for Leading with Trust

Charles H. Green
Andrea P. Howe



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Above all, thanks to our extraordinary clients, from whom we have learned all that we have managed to pass along.

Introduction

Why a Fieldbook

When my first book *The Trusted Advisor* was published in 2000, I (Charlie), along with my coauthors David Maister and Rob Galford, had no idea how many lives it would touch. To our delight, it has proven to be a perennial favorite for people in professional services. *The Trusted Advisor* is routinely recommended to and read by people at the middle manager, prepartner, and partner level in law firms, consulting firms, and accounting firms around the world. Much the same is true for industries like financial services, health care, architecture, and project management. In the decade since the book's release, tens of thousands of readers on every continent have gained insight into developing and maintaining trust-based relationships that are prosperous and rewarding. Yet, at the time we wrote it, none of us envisioned the impact the ensuing decade would have on the importance of trust in business and society at large. The case for trust is even more compelling than we had imagined.

The Trusted Advisor, for all its virtues, did not address how to apply the principles, models, and practices to sales—which I subsequently wrote about in *Trust-Based Selling*. What was now needed, I felt, was a more detailed how-to guide for people in *any* professional role. This latter need is met by this fieldbook, a hands-on addition to *The Trusted Advisor* and *Trust-Based Selling*.

Your success as a leader will always be based on the degree to which you are trusted by your stakeholders.

Andrea P. Howe joins me to bring you *The Trusted Advisor Fieldbook*. It is the culmination of what Andrea and I have learned from working specifically on the subject of trust, with national and global leaders. Andrea brings the expertise she has gained in her 20 years in consulting, including five years working with me at Trusted Advisor Associates. Together, we speak in concrete terms about how to dramatically improve your results in sales, relationship management, and organizational performance.

Who Should Read this Book

The Trusted Advisor Fieldbook is a practical guide to being a trusted advisor for leaders in any industry. Being trusted is a leadership quality that is neither cyclical nor faddish nor role-bound. Whether you are a business developer, account manager, salesperson, project manager, program manager, unit leader, team leader, client relationship manager, C-level executive, consultant, or manager, your success as a leader will always be based on the degree to which you are trusted by your stakeholders.

In this book, you will find answers to pervasive questions about trust and leadership—such as how to develop business with trust, nurture trust-based relationships, build and run a trustworthy organization, and develop your trust skill set. Put the knowledge and practices in this fieldbook to work, and you will become someone who earns trust quickly, consistently, and sustainably—in business and in life.

How to Use this Book

This pragmatic workbook is one you will want to reference again and again. The term *fieldbook* connotes a practical, dog-eared manual that you can keep in your laptop bag as an instant helper. It delivers everyday tools, approaches, exercises, resources, and actionable to-do lists for the wide range of situations that you will inevitably encounter. Each chapter offers specific ways to train your thinking and change your habits in order to earn the trust that is necessary to be influential, successful, and known as someone who makes a difference.

The best way to use this book is to get messy with it. Highlight your favorite passages. Fill out the worksheets. Complete the quizzes. Bend the corners of the pages you want to come back to. Wear it out!

The book is meant to be applied to the myriad stakeholder relationships in your life. As such, we've deliberately used the word "partner" as a term for anyone with whom you endeavor to build trust: clients, customers, buyers, prospects, colleagues, vendors, and more.

Throughout the book, you will find the following aids:

- *Self-administered worksheets* and *coaching questions* that provide immediate insights into your current business challenges.
- *Real-life examples* that demonstrate proven ways to walk the talk.
- *Action plans* that bridge the gap between insights and outcomes.

The best way to use this book is to get messy with it. Highlight your favorite passages. Fill out the worksheets. Complete the quizzes. Bend the corners of the pages you want to come back to. Wear it out!

Where to Begin

While *The Trusted Advisor Fieldbook* is not meant to be read in any particular order, you may find it helpful to peruse the first two sections before flipping to pertinent sections that speak to your situation today. If you have any doubts about the business case for trust, start with Chapter 28, “Making the Case for Trust.”

- *Read Section I, “A Trust Primer,” to get grounded in the fundamental truths of trust and trustworthiness.* You will learn the fundamental attitudes of trust and trustworthiness, the dynamics of influence, and the essential frameworks and skills for building trust.
- *Study Section II, “Developing Your Trust Skill Set,” to increase your self-awareness and self-efficacy in the five essential trust skills.* It provides practical details and helpful exercises to help you pinpoint where you need to grow.
- *Use Section III, “Developing Business with Trust,” when you want to up-end the traditionally adversarial relationship between buyer and seller, client and consultant, influencer and influencee.* Using real-life examples in a “Dear Abby” format, this section explores a full range of business development challenges, from before the first client meeting all the way to expanding the sale once the deal is done.
- *Turn to Section IV, “Managing Relationships with Trust,” to find out how to overcome your ego.* It’s true what the cartoon character Pogo famously said: “We have found the enemy and it is us.” This section delves into the ins and outs of relationships—from better navigating organizational politics to building trust remotely to

dealing with difficult partners who present themselves as aloof, disorganized, inappropriate, or simply untrustworthy.

- *Consult Section V, “Building and Running a Trustworthy Organization,” to discover the four shared beliefs that contribute to every organization’s success.* This section addresses major questions of implementation that arise, including how to create a culture of trust, build trust in teams, ease the tension between the long-term nature of trustworthiness and the urgency of quarterly measures, and how to train for trustworthiness.

If we have erred in any way, it is on the side of giving you too much, rather than too little. There is a lot to digest, so zero in on what resonates most for you today. Leave the rest for now—it will be here when you need it later.

Cheers!

*Charles H. Green
Andrea P. Howe*

Part I

A Trust Primer

U.S. Supreme Court Justice Potter Stewart once despaired of defining obscenity, but noted pointedly, “I know it when I see it.” Trust is much the same. People know when it exists and when it doesn’t, but cannot explain why or how it exists. And the concept of building trust seems even harder to describe, let alone implement.

We have made it our life’s work to better understand trust. Before we can discuss trust, however, we begin by putting it in context—without context, there is just theory and no practical implications. We could have simply suggested you do this or do that to build trust. That would only get you so far.

So we begin with a primer. This first section defines the key terms and concepts of our trust framework. We walk you through the difference between trusting and being trustworthy, along with other fundamental truths about trust. We also explore the dynamics of influence, which are important to grasp if you wish to consistently lead with trust.

Three frameworks will help you create personal and organizational trust:

- Attitudes—mind-sets or beliefs that provide fertile soil for trust.
- Models—three simple structures for understanding and applying trust.
- Essential Skills—the indispensable abilities and capacities of trust building.

With this solid foundation, you will be well equipped to put the practical tips, strategies, and best practices of later sections to work.

Chapter 1

Fundamental Truths

Building trust can be a surprisingly simple thing—yet it is anything but easy. Trust is a complex concept in human relationships. It is often misunderstood, even though it is something practiced somewhat unconsciously all the time. We intend this book to do double duty: to give you practical, commonsense advice, while at the same time allowing you to think critically and speak fluently about trust.

In this chapter we take aim at the complexities of trust, breaking it down so that it can be managed and more readily increased. We take a critical look at the paradoxes, dynamics, and language of trust. We explore maxims, such as “Trust is personal,” “Trust takes time,” and “There is no trust without risk.” We also describe the relationship between trust and influence and reveal the key that unlocks the mystery to being influential.

Fundamental Truth 1: Trust Requires Trusting and Being Trusted

Too often people use the word *trust* when what they mean is something else. In plain language, people talk about *trusting*—being willing to take a risk. People also talk about being *trusted*, or being *trustworthy*. When one person trusts and another is trustworthy, there is trust.

It is important to remember the distinction between trusting and being trustworthy. Usually, leading with trust requires you to focus on being *trustworthy*. However you cannot avoid occasionally having to do the *trusting*.