

# The Trusted ADVISOR FIELD BOOK

A Comprehensive Toolkit  
for Leading with Trust



CHARLES H. GREEN  
&  
ANDREA P. HOWE



## 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*

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Charles H. Green  
Andrea P. Howe



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*To our wonderful significant others,  
Judy and Alan, without whom  
the book could not have been written.*



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## Introduction

### Why a Fieldbook

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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

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*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

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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 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!

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*

# A Trust Primer



## 1 Part

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.

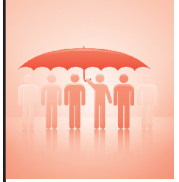
Three frameworks will help you create personal and organizational trust:

- 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.



# Fundamental Truths



## 1 Chapter

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*.

### Fundamental Truth 2: Trust Is Personal

When trust is discussed, it usually refers to people. Yes, you can trust a company, but when you do, you are typically focusing on just one part of trust—dependability. It makes perfect sense to say a company or organization is dependable or reliable. It does not make much sense to say that a corporate entity has your best interests at heart or is sensitive to your needs, or is discreet. Those are things you would usually say about people.

Even when it does make sense to say an organization is credible or careful or focused on your interests, the reference is usually to the people in it. At root, trust is personal.

**CASE STUDY****From the Front Lines: Trusting the Taxi Driver<sup>1</sup>**

During a trip to Denmark, I (Charlie) took a taxi from my hotel to the local train station. The fare was 70 kroner (about 15 U.S. dollars). I gave the driver a 200-kroner note. He gave me back 30 kroner change. Clearly something was wrong.

I realized I had three options for dealing with this little unpleasantness:

1. I could assume the taxi driver made a mental slip, and politely point with a smile at the note that was still in his hand, so he would notice his error.
2. I could assume he was trying to cheat me—but since he still had the 200-kroner note in his hand, I could just sternly point to it, and let him pretend it was an honest mistake.
3. I could assume he was trying to swindle a foreigner, and respond in anger: “You’re short, buddy; give me the other 100, and you can forget about a tip.”

I went with option one. I noted my suspicions, but chose not to act from them. The driver quickly gave me the extra 100 kroner back with a smile as if to indicate, “Oops, my mistake,” and I chose to believe him.

The thing about trusting is that it’s catching. The way you behave toward others influences the way they respond back to you. Whether you expect the best or the worst of people, you’ll almost always be right.

—Charles H. Green

### Fundamental Truth 3: Trust Is about Relationships

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That trust is about relationships seems an obvious point. Yet many people in business slip all too easily into self-absorption by focusing in ways that take their attention away from the person whose trust they are looking to gain. There is no such thing as a *solitary* trusted advisor—the term itself implies a relationship.

A major factor affecting trustworthiness is the issue of whether you are self-focused or other-focused. A great phrase to remember is this: “It’s not about you.” If you can remember that, then you will always remember trust is about relationships.

### Fundamental Truth 4: Trust Is Created in Interactions

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You will not become a trusted advisor through great marketing programs, great presentations, or even great blogs or tweets. Trust is created in your exchanges with others—especially one-on-one. That requires mastering the art of conversation, which you will learn to do using the Trust Creation Process: Engage, Listen, Frame, Envision, and Commit.

### Fundamental Truth 5: There Is No Trust without Risk

---

Ronald Reagan, the fortieth president of the United States, was known to quote a Russian proverb, “Trust, but verify.” For our purposes, the opposite is true. Real trust does not need verification; if you have to verify, it is not trust.

### Insight: The Three Ps of Trust

The Three Ps represent the core of our thinking on trust. This mnemonic device is designed to help you remember them:

1. Trust is Personal.
2. Trust is Paradoxical.
3. Trust is Positively correlated to risk.

Ready to start your new trust-based mind-set? Mind your Ps.

Sometimes businesspeople forget this and try to ameliorate or mitigate all risks. This is particularly true in professions like law, finance, or banking. But the essence of trust contains risk. A trust relationship cannot exist without someone taking a chance—and it is your job to lead the way. If you think, *I can't take that kind of risk yet because there's not enough trust in the relationship*, check your thinking. It is the very *taking of risks* that creates trust in the relationship.

### Fundamental Truth 6: Trust Is Paradoxical

Over and over again, you will discover that the things that create trust are the opposite of what you may think. That is why we say trust is paradoxical—in other words, it appears to defy logic. The best way to sell, it turns out, is to *stop trying to sell*. The best way to influence people is to *stop trying to influence them*. The best way to gain credibility is to *admit what you do not know*.

The paradoxical qualities of trust arise because trust is a higher-level relationship. The trust-creating thing to do is often the opposite of what your baser passions tell you to do. Fight or flight, self-preservation, the instinct to win—these are not the motives that drive trust. The ultimate paradox is that, by rising above such instincts, you end up getting better results than if you had striven for them in the first place.

### Fundamental Truth 7: Listening Drives Trust and Influence

One of the most important drivers of influence, says Robert Cialdini,<sup>2</sup> is reciprocity—the tendency to return a favor. If you do X for me, I will do Y for you. The inverse is true as well: If you do not do X for me, I will not do Y for you.

Reciprocity in trust-based relationships begins with listening. Listening is the skill that drives trust and influence. If you listen to me, I will listen to you. If you do not listen to me, I will not listen to you.

### Fundamental Truth 8: Trust Does Not Take Time

Contrary to popular wisdom, people make serious judgments of trust very quickly. Trust is a mix of the rational and the emotional and snap emotional judgments are commonplace. People decide almost instantaneously whether they trust you—without much proof.

The one exception is trust-as-reliability. Since reliability requires the passage of time to assess, that kind of trust necessarily takes time: others—not so much.

**CASE STUDY****From the Front Lines: The Power of Personal Connection**

Larry Friedman, former Executive Vice-President at Gallagher Benefit Services, one of the largest employee benefit agencies in the northeast United States, tells a story of going beyond professional boundaries to make a difference for someone in a very personal way.

“My client, Harold, and I happened to have a meeting several years ago in the January time frame. Harold and I had known each other professionally for over 20 years. During that time, he had progressed from bookkeeper to controller to CFO. My guess is that during these years he had also maintained a steady weight of 270 pounds—a lot for his 6-foot frame.

“It was a new year and I was focused on my own goal-setting for the year. It suddenly occurred to me to ask Harold about his goals. He said he wanted to take the weight off in a healthy way, once and for all.

“We created a structure, right then and there, to help him meet that goal. We wrote it down and reviewed his progress monthly. He joined a weight loss program, discovered he liked going to the gym, got a personal trainer, and worked out regularly.

“Then he mentioned that he had been running regularly on a treadmill. I had been a runner for many years. I found a five-kilometer race near Harold’s home, and said, ‘If you sign up, I’ll not only help you train for it, I’ll run it with you.’ He had never run that far in his life.

“I suppose it would have been easy to say, ‘I’ll be rooting for you. Call me and tell me how it went.’ But I really wanted to do it with him. It was risky for both of us: risky for me to offer, and risky for him to accept.

“He did accept my offer. When the race day arrived, he was determined to run it, not walk it. I ran next to him the whole way, and we finished the race together.

“To this day, Harold still runs, takes long walks with his wife, and has maintained a healthy weight for more than three years. In fact, this year he ran a 5K race on his own while raising money for a cause that he believed in. He’s a client for life as a result of our experience together. More importantly, he’s a friend for life.

“I have always believed that if I could help someone get more of what’s important to him as a person, then everything else will take care of itself. I don’t know *how* that happens—I’m not that scientific about it—but I believe it. I always taught people at Gallagher that when they build a personal relationship, it affects their business relationship, too. New or sustained business is a nice byproduct. The ultimate ‘win’ is making a difference for people.”

*—Larry Friedman (former Executive Vice-President, Gallagher Benefit Services)*

## Fundamental Truth 9: Trust Is Strong and Durable, Not Fragile

It’s often said that trust takes a long time to build, but only a moment to destroy. This is something of a myth. The propensity to trust others is a character trait derived from our upbringings, and it changes very slowly. When people lose trust in other people or institutions, it is roughly at the same level and pace that trust was built. Where trust is lost quickly, it often wasn’t deep trust to begin with. And when we deeply trust people, we are slow and loath to give up on them.

## Fundamental Truth 10: You Get What You Give

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Trust is a relationship characterized by reciprocity. If Person A trusts Person B, the odds are that Person B will behave in a more trustworthy manner than if Person A is suspicious of her. Leaders who are willing to trust their followers produce more trustworthy teams. Followers who are willing to trust their leaders invite them to live by a more trustworthy standard.

In the realms of buyers and sellers, clients and professionals, bosses and subordinates, this reciprocal relationship is particularly clear. If you listen to others, they are more likely to listen to you. If you take a risk, you increase the odds of a risk being taken in return. If you share personal information, chances are your partner will share in kind. While it may sound like a New Age mantra of some kind, “you get what you give” is an accurate description of human nature—and of successful business relationships.

These 10 fundamental truths are embedded in this book. They foundationally describe how we have come to think about trust.

**Worksheet: Your Truths about Trust**

What’s true for *you* about trust?

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What trust maxims do you live by?

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Which maxims serve you well? In what ways?

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Which maxims are limiting? In what ways?

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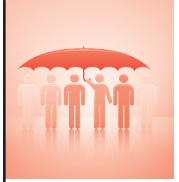
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# Fundamental Attitudes



## 2 Chapter

This chapter explores five attitudes that provide the foundation for building trust. These attitudes arise from the fundamental truths about trust explored in Chapter 1, and in turn inform the specific trust skills we will explore in Chapter 5. Understanding and adopting these attitudes will increase your success in your efforts to build trust and lead with trust.

Being trustworthy requires more than following a behavioral checklist—it demands getting right the underlying attitudes, mind-sets, outlooks, and ways of thinking. Adopt them, and you will find the behaviors come far more naturally and with less difficulty. In contrast, if you jump ahead to skills, tips, and tricks, you will be working the hard way. Get the attitudes right, and the actions will follow.

### Fundamental Attitude 1: Principles over Processes

Processes are important to business life—without them, wheels would constantly be reinvented. Leaders do not want a client-facing consultant to stare off into space when asked what his firm does, nor a receptionist to improvise when answering a phone call. Processes are a form of routine that foster consistency, scale, and a host of other benefits.

#### Insight: Trust-Building Is Learnable<sup>1</sup>

“You can communicate your intent without even saying a word. When people can sense that your intent serves their best interests, they are willing to open the trust valve at least a little. If that little bit is rewarded, they can risk a little more, and so on. If the risk is continually rewarded, trust grows. Of course, as you well know, all the hard earned work can vanish suddenly if the bond is broken. So constant attention to language and behaviors is critical—and learnable, and improvable.”

—Mahan Khalsa (author of *Let's Get Real* or *Let's Not Play*, and partner, ninety five 5)