

THE TRUSTED ADVISOR FIELDBOOK

A COMPREHENSIVE TOOLKIT FOR LEADING WITH TRUST

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Worksheet: Your Truths about Trust

What's true for *you* about trust?

What trust maxims do you live by?

Which maxims serve you well? In what ways?

Which maxims are limiting? In what ways?

Worksheet: Attitude Is Everything

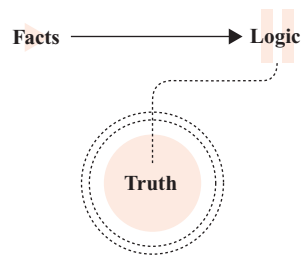
For each fundamental attitude, reflect on how this attitude is present (or not) in your day-to-day interactions with others. Jot down examples of how your actions align with each attitude, and examples of how they do not align.

| | How Your Actions Align | How Your Actions Do Not Align |
|---------------------------------------|------------------------|-------------------------------|
| Principles over processes | | |
| You are more connected than you think | | |
| It's not about you | | |
| Curiosity trumps knowing | | |
| Time works for you | | |

What do you notice as a result of answering these questions?

Figure 3.1

How People
Think People
Think



Worksheet: Learning from Role Models

Bring to mind someone whom you consider remarkably influential—someone who succeeds at getting the best result for all parties while cultivating a strong relationship in the process.

My model influencer:

What makes this person so effective? What does she think, say, or do?

In what ways do you consistently apply the same best practices your role model applies?

What opportunities do you see to improve your ability to be influential?

Worksheet: Putting the Dynamics of Influence to Work

Bring to mind an upcoming opportunity to be influential with one or more people. Describe it briefly, and then use the questions below to prepare for your interaction.

Opportunity:

What will help you detach from the outcome and remind yourself that the ultimate objective is to improve your partner's situation, as well as the relationship between you?

What point of view are you bringing to the interaction? State it crisply and simply.

What are you curious about? What questions might you ask to thoroughly understand and appreciate the perspectives of the other(s) with whom you will be in conversation?

In what ways can and will you be open to be influenced in the process? What might you learn? What could you discover that might alter your feelings or your point of view?

As a result of this preparation, how will you approach this opportunity differently from the way you have in the past?

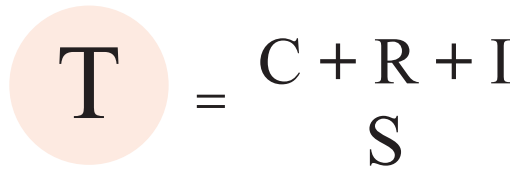
| Model | Description | Sample Uses |
|------------------------|---|---|
| Trust equation | An analytical model of the components of trustworthiness | When you know something is missing from a relationship but you're not sure what it is |
| Trust creation process | A depiction of how trust is built in conversation | When you are preparing for a conversation and your goal is to be influential |
| Trust principles | A set of values to guide organizational decisions and individual action | When you want to establish a culture of trust in a team or organization |

Figure 4.1

Using the
Three Trust
Models

Figure 4.2

The Trust
Equation



The diagram shows the Trust Equation as a large orange circle containing the letter 'T' on the left, followed by an equals sign, and then the sum of three terms: 'C + R + I' over 'S'. The 'C' and 'R' are on the top line, 'I' is on the top line, and 'S' is on the bottom line, all in a large serif font.

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

T = Trustworthiness

C = Credibility

R = Reliability

I = Intimacy

S = Self-Orientation

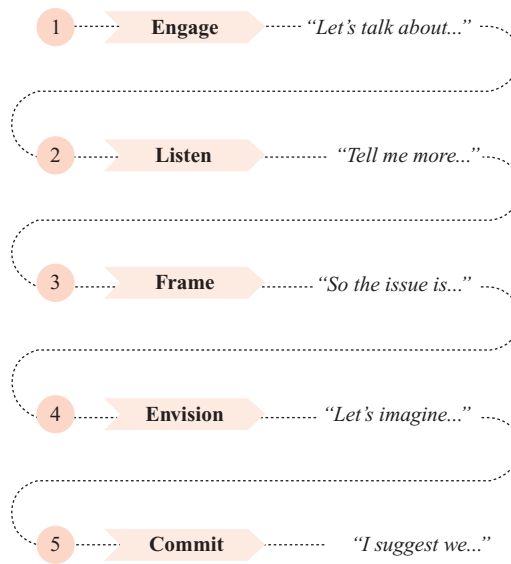


Figure 4.3

The Trust
Creation
Process
(ELFEC)

Figure 4.4

The Trust Principles

- 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 a short-term transactional focus.
- 4 A **HABIT OF BEING TRANSPARENT** in all your dealings.

Worksheet: Use the Trust Equation to Transform Your Relationships

Bring to mind a key stakeholder (e.g., client, prospect, colleague, staff member) with whom you'd like to have an improved—or even transformed—relationship.

My stakeholder:

Now score yourself in that relationship, using a scale of one 1 to 5, on each of the four variables of the Trust Equation. How credible does your stakeholder perceive you to be? How reliable? Intimate? Focused on him or her?

In the numerator, 5 is your highest score and 1 is lowest; in the denominator, 1 is your highest score and 5 is lowest.

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

Next, do the math: What is your Trust Quotient for this relationship? Plot it on the spectrum below. (Note that the median is skewed left. So of a possible .6 – 15, if you score a 7, that's actually very good.)



For each variable where your score is relatively high (4 or 5 for credibility, reliability, and intimacy, or 1 or 2 for self-orientation), what contributes to your success?

For each variable where your score is relatively low (1 or 2 for credibility, reliability, and intimacy, or 4 or 5 for self-orientation), in what ways might you close the gaps?

Tip: Share your assessment with your stakeholder and get her feedback.

Worksheet: ELFEC in Action

Reflecting on and studying the conversations you are having is a great way to increase your awareness about trust. Begin by thinking of a recent conversation with a key stakeholder.

My stakeholder:

Engage. How did you begin the conversation?

Did you offer something of value?

☐Y ☐N

Did you set a tone of openness for the conversation?

☐Y ☐N

In hindsight, what could you have said that might have been more engaging?

Listen. What kinds of questions did you ask to elicit information?

Looking back, were your questions open (as opposed to leading)?

☐Y ☐N

Did your questions elicit information about the rational *and* emotional reality of your stakeholder?

☐Y ☐N

Did you regularly summarize or paraphrase what you heard?

☐Y ☐N

Did you acknowledge out loud what you heard in the music of your stakeholder's communication (tone, emotion, mood)?

☐Y ☐N

In hindsight, what could you have asked or said that might have demonstrated that you were listening more deeply?

Frame. What did you say to frame the issue?

If risks were required to frame the issue honestly and accurately, did you take them?

☐Y ☐N

Did you articulate a point of view?

☐Y ☐N

Did you get confirmation that you had framed the issue appropriately?

☐Y ☐N

In hindsight, what could you have said that might have framed the issue more effectively?

Envision. What did you say to move the conversation to the Envision stage?

Did you vividly describe the to-be state of affairs?

☐Y ☐N

Did you include both emotional and rational aspects of the to-be state?

☐Y ☐N

In hindsight, what could you have said that might have been more effective at this stage?

Commit. What did you say to invite a commitment to take action?

Did you get a commitment to move forward, in some way?

☐Y ☐N

Were the next steps clear and agreed-to?

☐Y ☐N

Did they require movement for both parties?

☐Y ☐N

In hindsight, what could you have said that might have elicited more satisfying results?

Tip: Solicit feedback from a colleague who was present for the conversation—or even better, from the actual stakeholder—to test the accuracy of your self-assessment.

Tip: Video or audio-record an actual conversation, or a mock conversation. Use this worksheet to debrief it.

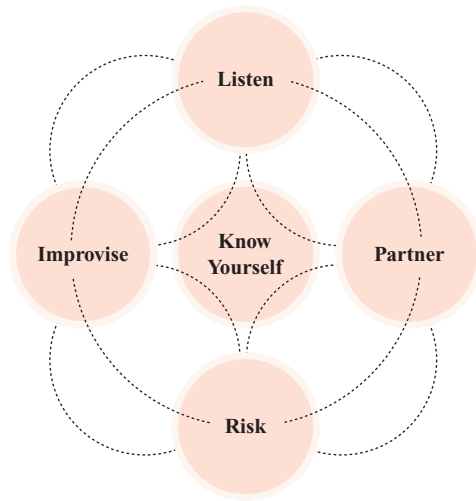
Worksheet: Living the Principles

For each trust principle, reflect on how you live by this principle (or not) in your day-to-day interactions with others. Jot down examples of how your attitudes and actions align with each principle, and examples of how they do not align. Use the examples in this chapter to guide your reflection.

| Trust Principle | How Your Attitudes and Actions Align | How Your Attitudes and Actions Do Not Align |
|--|--------------------------------------|---|
| A focus on the other for the other's sake, not just as a means to your own ends. | | |
| A collaborative approach to relationships. | | |
| A medium- to long-term relationship perspective. | | |
| A habit of being transparent in all your dealings. | | |

Figure 5.1

Five Trust
Skills



Worksheet: Your Trust Skills: A Self-Assessment

Knowing your own strengths and weaknesses is the first step on the road to improving your trust skills. Try rating yourself on each of the five trust skills presented in this chapter.

- Score yourself toward the right side of the scale if you identify the trust skill as a natural or developed strength that you consistently bring to your relationships.
- Score yourself toward the left side of the scale if you are less developed or inconsistent in that area.

| I bring this skill to my relationships: | | | | |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| | Seldom | Occasionally | To a Considerable Degree | Almost Always |
| | 1 | 2 | 3 | 4 |
| Listen. An ability to listen with empathy, with a focus on the act of listening itself. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Partner. The ability to give and take, be in sync, move gracefully, and be in step and in tune with another. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Improvise. The ability to be quick to respond, offer “yes, and” responses, subordinate your ego in the interest of collaboration, and give up looking good in exchange for being real. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Risk. The willingness and ability to tolerate ambiguity and exposure. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Know Yourself. The ability to be introspective about weaknesses and strengths, and maintain a level of self-awareness that is required for good self-management. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Choose one skill where you gave yourself a 3 or 4. In what ways do you demonstrate this strength? What contributes to your success?

Choose one skill where you gave yourself a 1 or 2. What makes it challenging for you to apply this skill?

What did you learn about yourself as a result of this exercise?

Tip: Share your assessment with a trusted colleague to get her perspective and feedback.

Figure 6.1

Five Trust
Skills: Listen

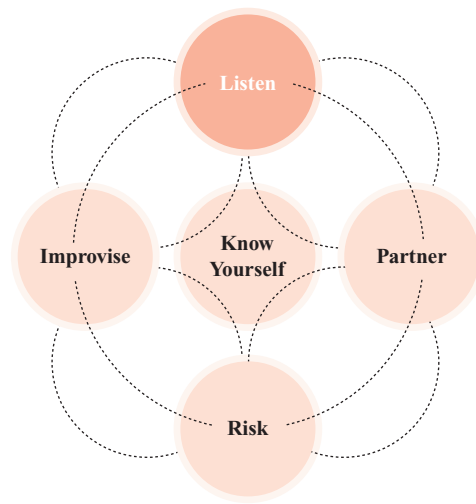


Figure 6.2
Three-Level
Listening

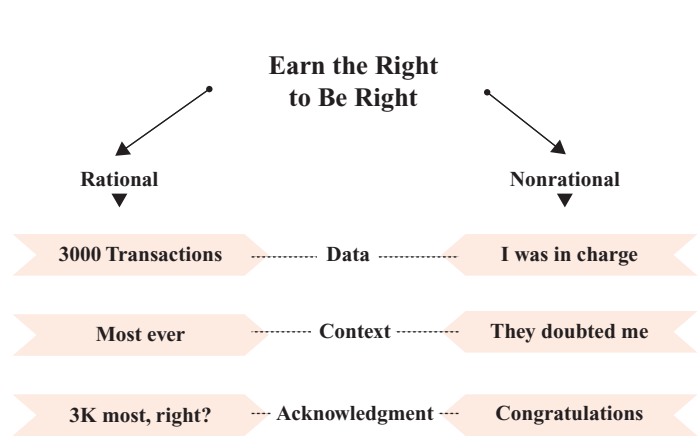


Figure 6.3

Empathetic
Statements
Followed
by Great
Questions

| What Your Partner Says | Empathetic Statement | Your Next Great Question |
|---|---|---|
| "I was in charge, and they doubted me." | "Sounds like you got the job done. Congratulations." | "What was that like for you?" |
| "You people have still not given me an answer to my original question." | "Ouch, I can hear your anger on this subject; I get that you're frustrated." | "Can we address right now how we go about getting that answer for you?" |
| "I don't see value in that." | "Sounds like we haven't done a good job making the case!" | "What's missing for you?" |
| "We're just not sure which way to go." | "That's a tough spot to be in." | "What options are you considering?" |
| "I'm disappointed by your team's results." | "I'm very sorry to hear that. We've clearly missed the mark from your perspective." | "Would you share some specifics about your disappointment?" |

Figure 6.4

Thinking Out Loud

| What Your Little Voice Says | What You Might Say Out Loud |
|---|--|
| "He seems distracted." | "Let's take a time out to be sure we're going in the right direction with this conversation." |
| "I'm not sure she understands what I'm getting at." | "At the risk of being overly assertive here, may I be blunt?" |
| "I am doing a lot of talking; someone shut me up!" | "I'm hearing myself doing a lot of the talking here. What haven't I asked that's important for you?" |

Worksheet: Listening for Trust

In general, what do you find most challenging when it comes to paying attention? Use the Four Barriers to Paying Attention list in this chapter as a guide.

Bring to mind an upcoming opportunity to listen to one or more people. Describe it briefly, and then use the questions below to prepare for your interaction. Use the description of Three-Level Listening in this chapter as your guide.

Opportunity:

What questions might you ask to elicit *rational* data and rational context?

-
-
-
-

What questions might you ask to elicit *nonrational* data and nonrational context?

-
-
-
-

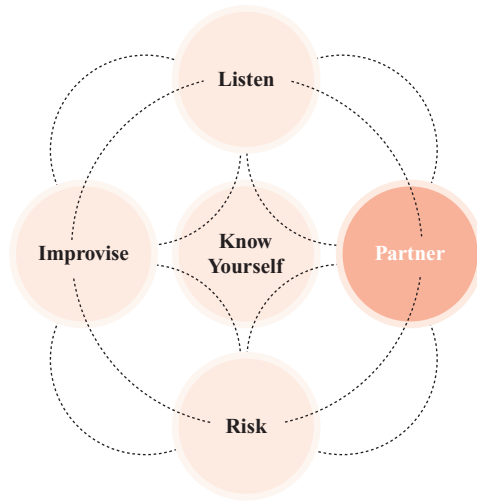
Imagine what your partner might say in response to your nonrational questions. What will you say to demonstrate empathy? And what question might you ask next to be curious and further build intimacy? An example is in the first row.

| What Your Partner Says | Empathetic Statement | Your Next Great Question |
|---|--|-------------------------------|
| "I was in charge, and they doubted me." | "Sounds like you got the job done. Congratulations." | "What was that like for you?" |
| | | |
| | | |
| | | |
| | | |

What did you learn as a result of this exercise?

Figure 7.1

Five Trust
Skills: Partner



| | 1 | 2 | 3 | 4 | 5 | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| A narrow view of relationship | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An expanded view of relationship |
| A win/lose mind-set | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | An all-for-one mind-set |
| Undermanaged self-orientation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Well-managed self-orientation |
| Lack of confidence | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Confidence |
| An overdeveloped ability to criticize | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A balanced perspective of positive and negative |
| A tendency to either lead <i>or</i> follow | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The ability to lead and follow interchangeably |
| A need for immediate gratification | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The ability to delay gratification |
| Intolerance of ambiguity | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Tolerance for not knowing or being in control |
| Discomfort with conflict | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Comfort with conflict |
| A limited view of problems and opportunities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A “we”-oriented view of problems and opportunities |

Figure 7.2
Rating Your Partnering Strengths and Weaknesses

Figure 7.3

Partnering
Practices

| Partnering Muscle | Partnering Practices |
|--------------------------------------|---|
| 1. An expanded view of relationships | <ul style="list-style-type: none"> • Notice that when it's raining on you, it's raining on everyone else, too. Make it a point to ponder this all week. • For two minutes each day, consciously envision the other person in the relationship as a partner—not an adversary, or a role, or a means to an end. |
| 2. An all-for-one mind-set | <ul style="list-style-type: none"> • Re-define what winning is within a particular partnership. Set your sights on a different target—one that is more service-oriented and reflective of a bigger picture. • Notice any fear-based reactions you have. Name what you are afraid of. Then practice responses based in curiosity. ("That could be interesting. Let's talk more.") It might take you seconds, days, or weeks to trump fear with curiosity. That's okay, try it anyway. |
| 3. Well-managed self-orientation | <ul style="list-style-type: none"> • Identify a situation or interaction when your mental energy was consumed with "it's about me" thinking: for example, when a partner seemed withdrawn and you spent several days wondering what you had done wrong. Then, practice mental dissociation. Make a list of all the possibilities outside of you that could be at play. |
| 4. Confidence | <ul style="list-style-type: none"> • Keep a running list of all the things you bring to a relationship—personal traits, experience, resources, and more. • Spend time thinking about your point of view on a matter that is relevant to a relationship you are in. Make notes about what led you to that point of view and what experience or evidence you have to back it up. Then make a plan to share your point of view. • The next time you feel the urge to blame someone for something that went awry, sit down and make note of how <i>you</i> contributed. It takes a lot of self-confidence to admit when you are wrong or see where you could be responsible. |

| Partnering Muscle | Partnering Practices |
|--|---|
| 5. A balanced perspective of positive and negative | <ul style="list-style-type: none"> • Use the improve technique “Yes, and!” to build on ideas. (For more details, see Chapter 8: “Improvise.”) • When you give feedback, start a list of what is positive and what works. Do not move to the “what’s negative/what doesn’t work” list until you are certain your partner really heard the good things. And when you do transition, do not use the words “but” or “however”—they have the effect of negating everything you said prior. • Expand your own capacity to receive positive feedback. When someone compliments you or acknowledges you for something, really hear it and say thank you. Do not deflect or deny. |
| 6. The ability to lead and follow interchangeably | <ul style="list-style-type: none"> • Note which you tend to do more—lead or follow. Make a point to do the opposite for one day. Create your own experiment, then reflect on it: What was easy? What was hard? What surprised you about the experience? Did you get different results? What makes sense to carry forward into another experiment? |
| 7. The ability to delay gratification | <ul style="list-style-type: none"> • Use the ‘Stoplight’ technique that some schools use to teach social/emotional skills. The next time you feel upset or impulsive: <ul style="list-style-type: none"> • Red light: Stop, calm down, and think before you act • Yellow light: Identify the range of things you should do beyond your first impulse • Green light: Choose the best one and try it out. • When your resolve gets shaky, distract yourself with another task. • Find a way to reward yourself when you successfully delay gratification. |
| 8. Tolerance for not knowing or being in control | <ul style="list-style-type: none"> • Adopt an attitude of “Isn’t this interesting! I wonder what will happen next.” Repeat this over and over to yourself whenever you feel frightened by ambiguity or lack of control. |

| Partnering Muscle | Partnering Practices |
|--|---|
| 9. Comfort with conflict | <ul style="list-style-type: none"> • Use the Thomas-Kilmann Conflict Mode Instrument, which measures your behavior in conflict situations along two basic dimensions: (1) assertiveness, the extent to which you attempt to satisfy your own concerns; and (2) cooperativeness, the extent to which you attempt to satisfy another's concerns. (At the time of this writing, a free version is available on-line.) • When a conflict or disagreement arises, celebrate it. Practice saying, "Oh good! We see that differently!" |
| 10. A "we"-oriented view of problems and opportunities | <ul style="list-style-type: none"> • Try mentally restating all of your problems as "we" problems for one week, where the "we" includes both you and your partner(s). |

Worksheet: Working Side by Side

Bring to mind two current relationships: one that is working well and one that isn't. Describe them briefly below, then answer the questions that follow.

Case 1: A Relationship That Is Working Well

Description:

Case 2: A Relationship That Is Not Working Well

Description:

Using the partnering traits at the beginning of this chapter, how would you rate each relationship?

Case 1: A Relationship That Is Working Well

| | |
|--|--|
| | |
| You maintain a mind-set of collaboration. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You work from a position of equal status. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You are willing and able to both lead and follow. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You balance assertiveness and cooperation. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You deal with disagreements and missteps productively and gracefully. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You demonstrate a commitment to sharing responsibility for achieving a goal. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You take responsibility for your part in the partnership's successes and failures. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |

Case 2: A Relationship That Is Not Working Well

| | |
|---|--|
| | |
| You maintain a mind-set of collaboration. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You work from a position of equal status. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You are willing and able to both lead and follow. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You balance assertiveness and cooperation. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You deal with disagreements and missteps productively and gracefully. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You demonstrate a commitment to sharing responsibility for achieving a goal. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |
| You take responsibility for whatever part you play in the partnership's successes and failures. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes |

For the traits present in the working-well relationship, what aids and sustains those?

For the traits not present in the not-working relationship, what is in the way?

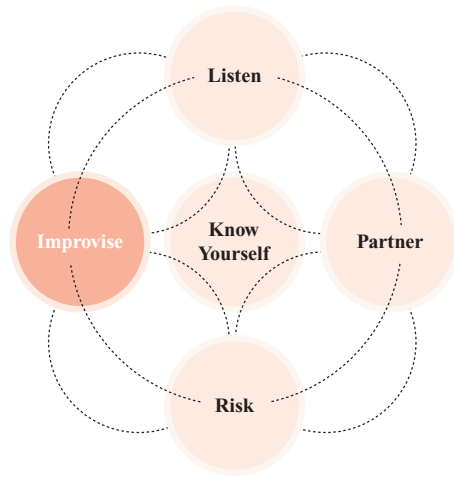
What opportunities do you now see to close the gaps?

What actions will you take as a result? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Figure 8.1

Five Trust
Skills:
Improvise



| When someone says: | You might be thinking: | Avoid saying: | Instead, think out loud by saying: |
|--|--|--|--|
| 1. "What experience do you have in XYZ industry?" | "Uh oh." | "Only a few years in the industry, but I do have blah blah blah ..." | "I have two years in the industry. Is that a concern?" |
| 2. "Why are you so much more expensive?" | "Because we're worth it! The other guys are cons!" | "Our prices are higher because blah blah blah ..." | "I hear you on 'too expensive.' There could be a number of reasons for a disconnect here. Would you help me understand what you mean by that?" |
| 3. "I'm very disappointed in your product." | "What? Huh? How can that be?" | "We feel it's a quality product and stand behind it." | "I'm not sure what to say—that's not at all what I was expecting to hear. It's certainly not what I want to hear. Can you tell me more?" |
| 4. "We're giving the account to someone else." | "%@#*!" | "Well, I guess we're finished here. Thanks for your time." | "Well, shoot. That's a real disappointment. I'm sorry to hear it. I'd like to hear more about what's behind that, if you're willing to share it." |
| 5. "Do you have any other people who could lead the workshop for us? There are concerns about your style." | "Ummmm... what's wrong with <i>me</i> ?" | "We have many global clients who like my style." | "Oh, no, ouch! I may need a moment to pick my ego up off the floor. In all seriousness, we do have others, and I'd be glad to work with you to find the best fit. Can you tell me more about what qualities are important to you? I won't take it personally—well, only a little!" |

Figure 8.2

Five Ways to Think Out Loud in a Moment of Truth

Figure 8.3

Using “Yes,
and ...” to
Think Out
Loud

| “Yes” | “and ...” |
|--|---|
| “I have two years in the industry.” | “Is that a concern?” |
| “I hear you on ‘too expensive.’” | “There could be a number of reasons for a disconnect here. Would you help me understand what you mean by that?” |
| “I’m not sure what to say—that’s not at all what I was expecting to hear.” | “It’s certainly not what I want to hear. Can you tell me more?” |
| “Well, shoot. That’s a real disappointment. I’m sorry to hear it.” | “I’d like to hear more about what’s behind that, if you’re willing to share it.” |
| “Oh, no, ouch! I may need a moment to pick my ego up off the floor!” | “In all seriousness, we do have others, and I’d be I glad to work with you to find the best fit. Can you tell me more about what qualities are important to you? I won’t take it personally—well, only a little!” |

Worksheet: Transform Moments of Truth into Moments of Mastery

Use this worksheet to script your responses to questions or comments that trigger a fight or flight response. Transform your need to survive into the willingness to be authentic in a positive and productive way.

List moments of truth you either have faced or will likely face in the next week. What was said, or what will likely be said, that will put your reptilian brain on high alert?

Complete the following table. For each trigger, identify what you might be thinking, what you would be tempted to say as a defense or explanation, and what thinking out loud with your thinking brain might sound like.

| 1 | 2 | 3 | 4 |
|--|-----------------------------|--|---|
| If someone says: | What you might be thinking: | What not to say as a defense or explanation: | Thinking out loud in an authentic, positive, and productive way say this: |
| "What experience do you have in XYZ industry?" | "Uh oh." | "Only a few years in the industry, but I do have blah blah blah ..." | "I have two years in the industry. Is that a concern?" |
| | | | |
| | | | |
| | | | |

Tip: Share your assessment with a colleague to get reactions and suggestions.
Tip: Practice saying out loud what you have written in Column 4.

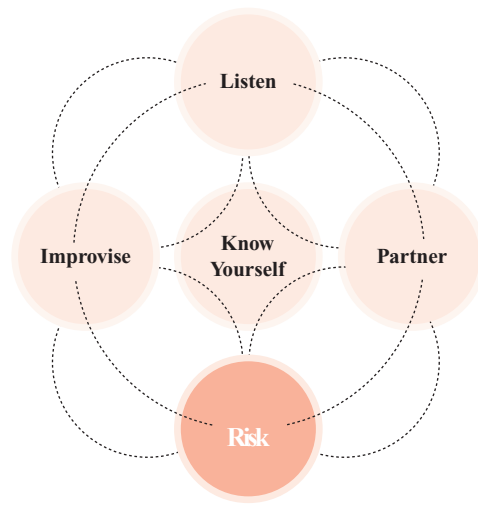


Figure 9.1

Five Trust
Skills: Risk

| Stated Reasons Not to Risk | Business Justification | Underlying Personal Motive |
|--------------------------------|---|-------------------------------|
| "I can't say I don't know ..." | "... because they expect subject mastery" | Fear of appearing incompetent |
| "I can't get too personal ..." | "... because they want an arms-length, 'professional relationship'" | Fear of being rejected |
| "I can't listen too long ..." | "... because they want answers" | Discomfort with ambiguity |

Figure 9.2

The Real Reasons We Don't Take Risks

Figure 9.3
Four Steps to
Name It and
Claim It

| | | | |
|--|--|---|---|
| Step 1: Define the issue. | We don't have the executive sponsorship we need. | We're not going to make the deadline. | I've lost sight of what we're really trying to accomplish. |
| Step 2: List all your concerns about speaking the issue. | <ul style="list-style-type: none"> • I might be wrong. • I'll step on someone's toes. | <ul style="list-style-type: none"> • I hate being the messenger. • It should have been dealt with sooner. | <ul style="list-style-type: none"> • It's embarrassing to admit. • I might look stupid. |
| Step 3: Turn your concerns into a caveat. | I may be completely missing the mark here, and I sure don't want to step on any toes. | I hate being the bearer of bad news, especially at this late juncture. | At the risk of embarrassing myself ... |
| Step 4: Put it all together. | "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." | "I hate being the bearer of bad news, especially at this late juncture. 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." |

Worksheet: Risk-Taking as a Matter of Practice

Bring to mind a key stakeholder (e.g., client, prospect, colleague, staff member) with whom you have an exemplary trust-based relationship.

My stakeholder:

In what ways is risk present in the relationship? How do you take risks? How does your stakeholder take risks?

Now, bring to mind a key stakeholder with whom you'd like to have an improved—or even transformed—relationship.

My stakeholder:

Consider each of the six ways to practice risk-taking as described in this chapter. Which ones do you regularly apply? What opportunities do you see to improve the relationship by taking more risk?

| Ways to Practice Risk-Taking | Frequency | Opportunities |
|---|--|---------------|
| 1. Be proactive about reducing ambiguity. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 2. Acknowledge uncomfortable situations out loud. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 3. Deliver hard news promptly and concisely. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 4. Take responsibility for mistakes. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 5. Be willing to express your own emotions. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 6. Share something personal. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |

What actions will you take as a result of this reflection? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |

What do you notice as a result of examining this relationship that might apply to other relationships?

Worksheet: Name It and Claim It

Think about a challenging business relationship where topics are being avoided or negative patterns aren't being called out. What isn't being said that needs to be said? Describe it briefly:

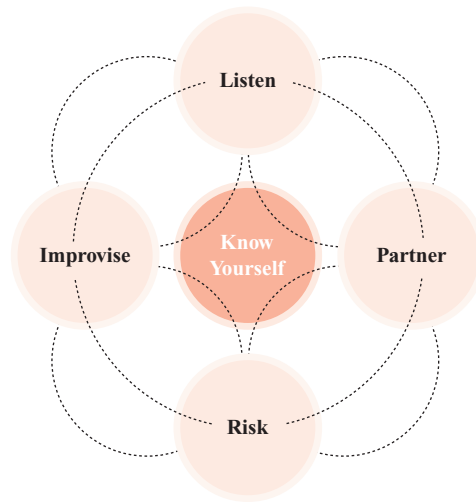
Use the four steps to Name It and Claim It in this chapter to imagine a way that you might put this hard truth on the table with your partner.

| | Example | Your Situation |
|--|---|----------------|
| Step 1: Define the issue, clearly and simply | <i>We don't have the executive sponsorship we need.</i> | |
| Step 2: List all your concerns about speaking the issue | <ul style="list-style-type: none">• <i>I might be wrong.</i>• <i>I'll step on someone's toes.</i> | |
| Step 3: Turn your concerns into a caveat | <i>I may be completely missing the mark here, and I sure don't want to step on any toes.</i> | |
| Step 4: Put it all together | <i>"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."</i> | |

What next steps will you take from here?

Figure 10.1

Five Trust
Skills: Know
Yourself



| Approach | Practices |
|---------------------------------------|--|
| Look inward | <ol style="list-style-type: none"> 1. <i>Articulate your personal values.</i> What matters most to you? A good way to find out is to write your own eulogy at your funeral. What would you want others to say about you and about what you stood for in your lifetime? Another practice is to develop a personal mission statement.^a 2. <i>Learn your Trust Quotient and Trust Temperament.</i> Know which variables of trustworthiness you tend to lead with and which ones you are more likely to de-emphasize or ignore. Pay special attention to doing what it takes to have consistent scores across all four variables.^b 3. <i>Delve into your working style and personality preferences.</i> There are dozens of frameworks available to help discover yours, including Tracom's Social Style(sm) Model, the Thomas-Kilmann Conflict Mode Instrument, the DiSC Profile, and the Meyers-Briggs Type Indicator, all of which can be useful. Choose one or two that align with your organization's programs and/or your personal interests. 4. <i>Use a journal to record your feelings.</i> Write about your experiences and your feelings about your experiences for several days or weeks. Let your thoughts and emotions flow freely. Create a private space for you and only you.^c 5. <i>Set regular time aside for reflection or meditation.</i> Take time away from the fray to reconnect with your deepest thoughts, feelings, and motivations. Try meditation. Or if sitting on a meditation cushion is not your thing, take long walks or drives, or pursue a hobby. |
| Turn blind spots into insights | <ol style="list-style-type: none"> 6. <i>Seek 360-degree feedback.</i> Use instruments such as the Trust 360 and Emotional Competence Inventory^d to collect feedback from internal and external raters. Compare their assessments to your own. What do you see? 7. <i>Conduct stakeholder interviews.</i> Whether you do this as part of a formal 360-degree assessment or as a stand-alone practice, talk to people you work with. Find out what they see as your strengths and your opportunities for improvement. Get specific. Check what you learn against your own self-perception. 8. <i>Record yourself.</i> Use video or audio technology to see or hear yourself in action. Watch yourself presenting or in conversation. What do you see that others see? What you are surprised by? Let those things motivate you to change. This highly effective means helps you quickly develop new and improved habits. |

Figure 10.2

Specific Practices for Expanding Your Self-Knowledge

| Approach | Practices |
|----------------------|---|
| Experiment regularly | <p>9. <i>Try something new that stretches you outside your comfort zone.</i> This could be anything from taking a new route to work to signing up for an improv comedy class to going skydiving. What you choose doesn't have to be extreme—it does have to be a step beyond what is typically comfortable for you. Choose something, do it, then reflect on it. What did the experience confirm about you? What did you discover or rediscover?</p> <p>10. <i>Develop a new relationship.</i> Get to know someone you wouldn't ordinarily gravitate towards. This could be a personal or professional relationship. What does interacting with this person teach you about yourself?</p> <p>11. <i>Develop mastery as a trusted advisor.</i> Regularly choose practices in the other skill chapters in this book—listen, improvise, partner, and risk—to hone your skills. Which is most comfortable? Least comfortable? How can you stretch beyond your current skill limits?</p> |

Worksheet: Self-Knowledge Is Power

This chapter identifies three approaches to expanding your self-knowledge: look inward, turn blind spots into insights, and experiment regularly. For each, choose one practice based on the ideas provided. What specifically will you do to achieve a level of self-awareness that, paradoxically, will lower your self-orientation and improve your ability to connect with others?

| Approach | Description | Your Actions |
|--|---|--------------|
| Look inward. | There are myriad tools to help you profile yourself. Use them. Discover your values, preferences, strengths, and weaknesses. Get familiar with your inner voice—a critical guidepost for decision-making. | |
| Turn blind spots into insights. | See yourself as others do by seeking and integrating feedback. Bring to light aspects of yourself that are hidden from you but apparent to others. | |
| Experiment regularly. | Move away from the familiar and comfortable. Test out new skills, experiences, and relationships on an ongoing basis. | |

Worksheet: Putting the Trust Principles to Work

Consider the myriad ways to apply the trust principles in the early stages of new business relationships to help to build your brand, gain sales, and create enduring client relationships. Use the examples provided in this chapter to identify areas of strength as well as areas of opportunity. What works for your business? In what ways could you take your business development and marketing to the next level?

| Trust Principle | Areas of Strength | Areas of Opportunity |
|--|-------------------|----------------------|
| Focus on your customer. | | |
| Collaborate to drive new business. | | |
| Focus on relationships, not transactions. | | |
| Be transparent with prospects and clients. | | |

What actions will you take as a result of this reflection? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Worksheet: Trust-Based Networking in Practice

Trust-based networking is about focus on the other: listening, respect, low self-orientation, and transparency. The goal of trust-based networking is to help other people develop their businesses.

Consider the 10 best practices for trust-based networking outlined in this chapter. To what extent do you already apply these practices? What opportunities do you see to take your networking to the next level?

| Best Practices for Trust-Based Networking | Frequency | Opportunities |
|--|--|---------------|
| 1. Be present. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 2. Recognize others' contributions. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 3. Collaborate. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 4. Talk about yourself less and your partner more. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 5. Add value. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 6. Diversify your network. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 7. Research. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 8. Make introductions. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 9. Take better notes. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 10. Keep making contact. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |

Prioritize your top two opportunities for networking improvement, and note them here:

1.
2.

What actions will you take as a result of this reflection? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Worksheet: Transforming Your Pitch

Bring to mind a current sales situation where you see an opportunity to transform your pitch. Describe it briefly below, then answer the questions that follow. If you don't have a current situation, reflect on what you could have done differently in the past. The key is to bring a real and specific situation to mind.

Situation:

Of the Nine Rules for Transforming Your Pitch, which ones could you apply?

Rule 1: Sometimes the best pitch is no pitch. ☐Y ☐N

Rule 2: Don't skip the pre-pitch warm-up. ☐Y ☐N

Rule 3: Make it interactive. ☐Y ☐N

Rule 4: Have a point of view. ☐Y ☐N

Rule 5: Take the preoccupation out of talking price. ☐Y ☐N

Rule 6: With PowerPoint, less is more. ☐Y ☐N

Rule 7: Stop selling your qualifications. ☐Y ☐N

Rule 8: Do not denigrate the competition. ☐Y ☐N

Rule 9: Be willing to ditch the pitch. ☐Y ☐N

How would you apply the ones you selected? Be specific.

What actions will you take as a result? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

What do you see as a result of examining this situation that might apply to other sales situations?

Worksheet: Objection!

Write down the three statements that you interpret as objections—phrases you have heard in the past or anticipate hearing in the future. Pick those with the greatest emotional charge for you—the ones you least like to deal with or are most likely to take personally. Then translate these statements. How is each an invitation? What concerns or opportunities might be underlying what is being expressed?

| Statement Interpreted as an Objection | How Is It an Invitation? | What Might be the Underlying Concerns? | In What Ways Is It an Opportunity? |
|---------------------------------------|--------------------------|--|------------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

How might you apply the best practices in this chapter—such as change your language, actively pursue concerns, and meet emotion with emotion—to interact differently with your buyers?

What did you learn as a result of this exercise?

Figure 15.1

What “Your Price Is Too High” Means

| | What They Say | What They Mean |
|----------------------------|---|--|
| 1. The Uninformed Buyer | “Oh, that’s way bigger than I thought.” | “I feel ashamed. I didn’t understand what was involved in making this purchase before talking to this person. I should have known. It’s my fault.” |
| 2. The Out-of-Budget Buyer | “That’s more than we can afford.” | “I feel embarrassed. I invited this person in thinking we could do it in this year’s budget. Now I see that won’t work. How awkward.” |
| 3. The Engineer Buyer | “Wait a minute, competitors’ prices aren’t that high. I don’t see why it should be that much. That doesn’t make sense.” | “I feel threatened. They must be quoting me a heavily loaded price. They can’t get away with that!” |
| 4. The Comparison Shopper | “Wait—how do I know I’m getting the best deal?” | “I will feel stupid if I don’t get a good deal, so I need to know your real, true, best possible, final price—and I have to believe you.” |
| 5. The Bazaar Lover | “Oh we couldn’t possibly go that high for this kind of service—it’s just not worth it!” | “The game is afoot! I want to win. I don’t care what you quote me; I’m going to get 20% off! I love this part of the buying process!” |

Worksheet: The Price Is Right

Being aware of your own uneasiness with discussing price is the first and critical step towards easing everyone's natural discomfort with the topic. What worries, fears, or concerns do you have about talking price—especially early in the sales process?

Bring to mind the last time you lost a sale and were told it was because of price. Looking back, what was the quality of your relationship with the buyer(s)? What evidence did you have of the presence or absence of a trust-based relationship?

If you had an opportunity to re-create that sales situation, what might you do differently?

If you have had misunderstandings about scope, quality, or other factors related to price with past customers, what might you have done to prevent them?

What do you see as a result of examining this situation that might apply to other relationships?

Worksheet: Stop Closing, Start Helping

Bring to mind two situations: (1) a time when you or your colleagues successfully completed a sale with a buyer—that is, you were able to help the buyer make decisions at a pace appropriate to him, while moving the relationship forward—and (2) a time when you did not successfully “close” a sale.

Describe them briefly below, then answer the questions that follow.

Case 1: A Successfully Completed Sale

Description:

Case 2: An Unsuccessful “Close”

Description:

Using the five practices to stop closing and start helping in this chapter, how would you assess each situation?

Case 1: A Successful Close

To what extent did you:

| | | | |
|--|----------------------------|----------------------------|-----------------------------------|
| Let go of the sale itself? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Understand your buyer’s motives? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Envision a positive future? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Keep your personal needs out of it? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Replace closing language with action language? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |

What other factors contributed to the positive result?

How would you characterize the quality of the relationship with the buyer today?

What practices do you want to carry forward into the next opportunity to successfully complete a sale?

Case 2: An Unsuccessful “Close”

To what extent did you:

| | | | |
|--|----------------------------|----------------------------|-----------------------------------|
| Let go of the sale itself? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Understand your buyer’s motives? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Envision a positive future? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Keep your personal needs out of it? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |
| Replace closing language with action language? | <input type="checkbox"/> Y | <input type="checkbox"/> N | <input type="checkbox"/> Somewhat |

What other factors contributed to the less-than-positive result?

How would you characterize the quality of the relationship with the buyer today?

What do you want to be sure to do differently the next time?

Worksheet: Develop New Business Naturally

Examine an existing client relationship to identify opportunities to expand the relationship. For relationships that teams are assigned to, this is an excellent team exercise.

Organization/Client Name:

What opportunities are there to move *upstream* in the organization?

What opportunities are there to cross-sell *within* the organization?

What opportunities are there to seek referrals *outside* the organization?

By your assessment, to what extent is your existing client inclined to help you? In what ways?

What, if anything, is missing in the current relationship?

In what ways might you deepen the relationship before you attempt to expand the work you are doing?

What insight has this reflection provided about a conversation you might have with your client?

What actions will you take as a result? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |

| Aspects of the CXO's World | What You Can Do |
|--|---|
| 1. Sphere of influence. The CXO has responsibility across the entire organization. | <ul style="list-style-type: none"> • Put more emphasis on the <i>why</i> of your proposal than the <i>how</i>. • Adopt the language of organizations: strategy, impact, change. |
| 2. Resource constraints. A CXO works with inadequate resources under difficult deadlines. There isn't time, budget, or resources to say yes to many of the requests received. | <ul style="list-style-type: none"> • Be quick to demonstrate the value you bring. • Come prepared to directly describe a real problem and your solution. • Be concise and clear in your communications. • Serve as a sounding board. |
| 3. Data overload. The CXO is besieged with data, though it is often incomplete, inconclusive, or contradictory. | <ul style="list-style-type: none"> • Help simplify, clarify, and focus. • Help identify the few critical factors in making a decision. |
| 4. Isolation. It's lonely at the top. The information a CXO receives is often filtered by subordinates, suppliers, and others who have their own agenda, who don't want to deliver bad news, or who may be operating from fear. | <ul style="list-style-type: none"> • Tell the truth as directly and succinctly as you can. • Deliver bad news immediately. • Be willing to say, "I don't know." • Become someone the CXO can turn to for counsel. • Avoid "spin" at all costs. |
| 5. Complex decision making. The CXO is faced with many complex decisions, and is ultimately responsible for them. The buck stops with her. | <ul style="list-style-type: none"> • Help the CXO make the decision that is right for the organization as a whole, not right for a portion of it, or right for you. • Sometimes the right thing for the CXO to choose is to do nothing. Respect this decision. • Focus on being a helpful part of the decision-making process, not on the decision itself. |

Figure 18.1

Five Aspects of the CXO's World

Worksheet: Get Ready for the C-Suite

Bring to mind a C-level executive to whom you would like to make a sale.

My C-level executive:

Spend some time reflecting on what it's like in her world. Write a vivid description below. Consider her sphere of influence, resource constraints, risk of data overload and isolation, and complex decision making.

What did you learn as a result of this exercise?

Think about how you might specifically apply the nine best practices for successful C-suite meetings from this chapter to help you make the most of a meeting with him.

| Best Practices for Successful C-Suite Meetings | Specific Applications |
|--|-----------------------|
| 1. Bring the right mind-set. | |
| 2. Prepare, then adapt. | |
| 3. Make connecting a priority. | |
| 4. Bring five slides (if any), not fifty. | |
| 5. Listen with empathy. | |
| 6. Speak plainly and honestly. | |
| 7. Master the 30-second answer. | |
| 8. Do your thinking out loud. | |
| 9. Watch the CXO's watch, not yours. | |

What actions will you take as a result of this reflection? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |

Worksheet: Relationship Resuscitation

Bring to mind a relationship with a buyer that seems to have stalled—nothing is happening, you don’t know what is wrong, and you aren’t sure there is a good way to talk about it. Working independently or with your team members, reflect on the relationship using the questions below and arrive at a point of view about what actions to take, if any.

My buyer:

At what point did the relationship stall?

What specific evidence is there of a stall (for example, three unreturned phone calls)?

What assumptions have you made—mentally or verbally—to explain the stall?

Setting these assumptions aside, how might you *acknowledge the communication barrier* directly with your buyer? What words could you use?

How might you *up the ante* to inspire interest in a new, larger issue? What point of view do you have to share?

What actions do you need to take as a result of this reflection? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |

Worksheet: Recognizing Project Start-Up Pitfalls

How you start a project can have an outsized impact on the result of the project. Bring to mind the last time you were involved in a project kickoff. Describe the project briefly below. Then, answer the questions that follow.

Project:

In what ways did you fall prey to the common pitfalls of the project start-up stage?

In what ways did the project start-up go well?

What did you learn that you will apply to your next project?

| Trust Elements | Time Required |
|----------------|--------------------------------|
| Credibility | Not much |
| Reliability | Yes, by definition |
| Intimacy | Not necessarily, usually quick |
| Other-focus | Not necessarily, usually quick |

Figure 21.1
Time Required
to Establish
Trust

Worksheet: The Speed Pass to Trust

Trust creation begins the instant you start interacting with someone. The key to accelerating trust is to hit the ground running with all your trust mind-sets and skillsets intact from the outset.

What mind-sets do you hold that may be slowing you down when it comes to building trust rapidly—about trust-building, about your customers, about your colleagues, about yourself? What new mind-sets could replace your current thinking?

| Current Mind-Set | New Mind-Set |
|---------------------------------------|--|
| Example: Trust takes time. | High degrees of trust can be established in an instant. |
| Example: I don't make friends easily. | I'm easy to approach; people like to spend time with me. |
| | |
| | |
| | |

Bring to mind a key stakeholder (e.g., client, prospect, colleague, staff member) with whom you would like to accelerate trust.

My stakeholder:

Why is this relationship important to you?

What outcomes are you committed to in this relationship?

Using the resources in this chapter, what best practices could you apply to rapidly increase the level of trust in the relationship across all four variables?

What specific actions will you take as a result?

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

What do you notice from examining this relationship that might apply to other relationships?

Worksheet: Possibility in Politics

Politics is an inevitable dimension of organizational life. It is neutral in itself—how you view and address politics can be negative or positive.

What mind-sets do you hold about politics that may be impeding your ability to be effective? Think about what words immediately come to mind when you think of organizational politics. What new mind-sets could replace your current mind-sets?

| Current Mind-Set | New Mind-Set |
|--------------------------------------|--|
| Example: Politics is dirty business. | Politics is normal—it's a sign of life in an organization; nothing more, nothing less. |
| | |
| | |
| | |

Bring to mind a specific situation that has a political dimension. Describe it:

Think about how you might specifically apply the seven best practices for dealing with organizational politics from this chapter to this situation.

| Best Practices for Dealing with Organizational Politics | Specific Applications |
|---|-----------------------|
| 1. See the organization as your client. | |
| 2. Put politics on the table. | |
| 3. Stay neutral. | |
| 4. Frame the issue. | |
| 5. Be a guide, not a decision-maker. | |
| 6. Envision a positive future. | |
| 7. Proceed with respect. | |

What actions will you take as a result of this examination? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |

Figure 23.1

Shifting
Conversations
from Tactical
to Strategic

| <p>Scenario 1: Your partner is Amy, head of recruiting. You’ve been working with her to implement an executive directive to a smaller and more targeted set of colleges for the upcoming recruiting season.</p> <p>Amy is expected to develop a strategic recruiting plan and she’s getting lost in the details.</p> | | |
|---|--|--|
| Your Part in the Problem | Barriers Preventing Your Partner from Thinking Strategically | What Matters to Your Partner |
| <ul style="list-style-type: none"> You haven’t taken the time to demonstrate empathy for the situation she’s in; she doesn’t see you as someone who really gets it. You’ve been telling her what to do, not collaborating with her on the solution. | <ul style="list-style-type: none"> She’s a high achiever who derives satisfaction from excelling, so immediate details matter immensely to her. She doesn’t see how there’s time to get it all done, so she falls prey to the Tyranny of the Urgent. | <ul style="list-style-type: none"> Maintaining her well-earned reputation of excellence in all dimensions. Solving problems in collaborative ways. Integrating work life and family life. Managing the perceived time crunch. |
| <p>How to Engage</p> <p>“Amy, I have a real appreciation for the pressure you’re under to deliver the product by June 15. It’s a high stakes project with an impossible deadline and you’ve worked hard to earn the reputation of someone who only delivers top quality results—all while striving to be a role model for work/life balance. I’m concerned that we’re losing sight of the big picture in the meantime. I have some ideas for how we can achieve the best of both worlds and ease the pressure. I’d like to hear your ideas as well. I’m sure that, together, we can come up with a really good solution. Would you be willing to spend some time with me on this issue?”</p> | | |

| <p>Scenario 2: Your partner is John, who appears to be inconsistent and impulsive in his dealings with subordinates. Others have mentioned this to you. His management style is causing some tension in the organization. He’s new to his role and doesn’t appear to have a well-thought-out approach to managing his people.</p> | | |
|---|--|--|
| Your Part in the Problem | Barriers Preventing Your Partner from Thinking Strategically | What Matters to Your Partner |
| <ul style="list-style-type: none"> You’ve been indirect. You’ve been writing him off as incapable rather than seeing him as facing what all good managers inevitably face. You haven’t established yourself as a resource for management best practices. | <ul style="list-style-type: none"> His organization doesn’t offer much in the way of training and coaching for managers at his level. He’s feeling a bit lost but doesn’t want to lose others’ confidence. | <ul style="list-style-type: none"> Being well-prepared. Getting things done swiftly. Having a sense of accomplishment. Being known as a good manager. |
| <p>How to Engage</p> <p>“John, how to maintain both a tactical focus and a strategic focus is a dilemma that every good manager faces. I know you don’t have a lot of resources at your fingertips to help navigate the terrain. I can help you with that in some very specific ways that I think will take some of the immediate pressure off you and improve your ability to get the results you want, faster. Let’s talk about it.”</p> | | |

Scenario 3: Your partner is Pat, head of marketing for a medium-sized law firm. She's charged with increasing revenue, and the number of new clients, over a two-year period. She has a lot of flexibility and autonomy in terms of how to get there. For the past two months she's had you focused on drafting a brochure. You and your team have broader expertise.

| Your Part in the Problem | Barriers Preventing Your Partner from Thinking Strategically | What Matters to Your Partner |
|--|---|---|
| <ul style="list-style-type: none"> You've let your desire to please and be helpful get in the way of your commitment to providing maximum value. you haven't been thinking and communicating in bottom line terms. | <ul style="list-style-type: none"> There are so many things to focus on, it is hard for her to know where to start. Pressure from her leadership team to fix the immediate problem. | <ul style="list-style-type: none"> Getting what she pays for. Demonstrating to her boss that she's a good custodian of the organization's resources. Being a part of any solution, not just taking others' advice. |

How to Engage

"Pat, the bottom line is you're overpaying me for the kinds of tasks I've been focusing on. I need to do a better job of keeping us focused on both the immediate problems and the longer-term picture. That way you will get maximum value for your investment and get help being responsive to what your higher-ups are demanding. I have some ideas. Can we talk?"

Worksheet: Shifting a Conversation from Tactical to Strategic

Shifting a conversation from tactical to strategic starts with you.

Bring to mind a current situation where you see an opportunity to shift the conversation from tactical to strategic. Describe it briefly, and then answer the questions below. If you do not have a current situation, reflect on what you could have done differently in the past. The key is to bring a real and specific situation to mind.

Situation:

Next, ask yourself four key questions. Get really curious about each of these four areas, and you'll find that whole worlds open up that were previously obscured.

How am I part of the problem? Use the questions in this chapter as your guide.

What barriers are preventing my partner from thinking strategically? Use the questions in this chapter as your guide.

What really matters to my partner? Use the questions in this chapter as your guide.

How can I help clear the path for what matters to my partner? Use the questions in this chapter as your guide.

What do you see as a result of examining this situation that might apply to other situations?

Figure 24.1

Reframing
Problems
to Inspire
Collaboration

| Steps | Problem Statement (Iterations) | Your Insights |
|--|---|--|
| 1. Write down the problem statement as authentically as you can state it. | “The problem is he doesn’t get it and he’s rude.” | |
| 2. Take the (exclusive) focus off your partner. | “We can’t get him to understand, and he is disrespectful.” | Maybe we’re not communicating in a way that works for him. Or maybe there’s something going on with him that we don’t know about, that has nothing to do with us. |
| 3. Remove any version of the verb “to be.” | “We can’t get his attention or his respect.” | There’s a difference between him being disrespectful and our ability to earn his respect. Perhaps we aren’t doing what we need to do to earn it. We haven’t asked, so we don’t know. |
| 4. Make sure your “we” includes both parties. | “We have very different approaches to communication.” | The fundamental issue is a communication issue. <i>That’s</i> the real problem to be solved. And maybe he’s as frustrated as we are. |
| 5. Imagine showing it (or speaking it) to your partner. Would he vigorously nod his head in agreement? | “We aren’t communicating effectively, and that leads to frustration for us all.” | |

Worksheet: Five Steps to a Better Problem Statement

Try your own hand at reframing a problem you are currently facing in one of your relationships. Use the example in this chapter as your guide.

Describe the situation:

Apply the five steps to a better problem statement:

| Steps | Iterations | Insights |
|--|----------------------------|----------|
| 1. Write down the problem statement as authentically as you can state it. | (ORIGINAL) The problem is: | |
| 2. Take the (exclusive) focus off your partner. | (BETTER) The problem is: | |
| 3. Remove any conjugation of the verb "to be." | (BETTER) The problem is | |
| 4. Make sure your "we" includes both parties. | (BETTER) The problem is: | |
| 5. Imagine showing it (or speaking it) to your partner. Would he vigorously nod his head in agreement? | (BEST) The problem is: | |

What do you now see as a result of reframing the problem?

What actions will you take as a result? Be specific.

| What | By When | With Whom | Support I Will Ask For |
|------|---------|-----------|------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

Worksheet: Constructive Confrontation

Bring to mind a relationship that seems untenable because there is something you cannot trust about your partner, yet you recognize constructive confrontation might help.

Evaluate the minuses and pluses of talking to him or her, and the probabilities of each outcome actually happening. Make the issue tangible, in a very simple way.

| Talking: The Minuses | Probability (High/Med/Low) | Talking: The Pluses | Probability (High/Med/Low) |
|-------------------------|-------------------------------|------------------------|-------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

If your analysis still suggests you avoid the conversation, review it with a trusted friend or two.

Assuming you arrive at the conclusion to have the conversation, how might you approach your partner with a request for help and an honest willingness to listen? Script out the words you would say to open the conversation.

What do you notice as a result of this examination?

What actions do you intend to take?

Worksheet: Negotiations: From Good to Great

Bring to mind a recent negotiation that you were involved in or observed. Consider the negotiating style, positioning, and approach taken by each of the participants. How were the trust principles absent or in evidence?

Other focus:

Transparency:

Medium- to long-term perspective:

Collaboration:

If the negotiation went well, what's made the biggest difference? If it fell short, what *would* have made the biggest difference?

What do you see as the prevailing mind-sets about negotiation in your environment in which you are working?

What can you apply during your next negotiation to build more trust in the process?

Figure 27.1

Choosing the
Right
Communication
Tool: Richness
versus
Timeliness

| | E-mail | Instant messaging | SMS text messaging | Telephone conference | Web conference (with audio) | Video conference |
|------------|--------|----------------------|-----------------------|-------------------------|-----------------------------------|---------------------|
| Richness | Low | Low | Low | Medium | Medium | High |
| Timeliness | Low | High | Low to Medium | High | High | High |

Worksheet: Trust in Virtual Teams

Consider the ten best practices for managing virtual teams outlined in this chapter. To what extent do you already apply these practices? What opportunities do you see to take your team(s) to the next level?

| Best Practice for Managing Virtual Teams | Frequency | Opportunities |
|---|--|---------------|
| 1. Make face time happen. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 2. Use the right tools. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 3. Increase team intimacy. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 4. Make your work process consistent. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 5. Set communication standards. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 6. Set goals and expectations. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 7. Avoid over-communication and interruption. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 8. Be available. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 9. Be explicit. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |
| 10. Model trust-based communication. | <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes | |

Worksheet: Your Custom Case

The case for trust can be made on many dimensions.

In what ways do you see the benefits of trust present in your organization today?

Economic:

Social:

Ethical:

What opportunities exist to increase organizational effectiveness by increasing trust?

Economic:

Social:

Ethical:

Figure 29.1

The Differences between Typical Change Initiatives and Building a Culture of Trust

| Dimensions | Typical Change Initiatives | Trust Initiatives |
|---------------------------|---------------------------------------|--|
| 1. Where it starts | At the executive level | Anywhere |
| 2. Where the focus is | Business processes, structures, roles | Principles and personal attributes |
| 3. What changes in people | Behaviors only | Mind-sets and behaviors |
| 4. Who spreads it | Organizational leaders | Informal leaders |
| 5. How it spreads | Systematically, through directives | Virally, through stories and examples |
| 6. How it is implemented | Chain of command, followership | Personal accountability, responsibility, risk-taking |
| 7. What motivates people | Incentives, mainly extrinsic | Aspirations, mainly intrinsic |
| 8. How it is measured | Quantitative “smartly” | Qualitative wisely |

Figure 29.2

The Trust
Roadmap

| | | A | B | C | D |
|---|------------------------|---|--|--|--|
| | | Collaboration | Medium- to Long- Term Perspective | Transparency | Other Focus |
| 1 | External Relationships | You work together with customers, suppliers, and others to respond innovatively to opportunities and problems. | You consider past, present, and future when negotiating a current deal with people outside of the organization. | Your organization is open and honest in its dealings with people outside of it. | In working with customers, suppliers, and clients you put their needs first, not yours. |
| 2 | Leadership | Your leaders seek opinions and work together with employees at all levels as part of the decision-making process. | Your leaders are willing to sacrifice short-term gains for the long-term benefit of the organization. | Employees understand your leadership's rationale for making decisions. | Your leaders set the right examples by putting others first, even at the expense of short-term gain. |
| 3 | Structure | It's clear your teams/groups/divisions coordinate their efforts. | There's an effective handoff between the people who sell the work and the people who do the work. | Employees understand who does what at your organization. | Others know whom to contact within the organization to get what they need. |
| 4 | Rewards | Your organization encourages collaboration. | Your organization acknowledges people for doing the right thing from a long-term perspective. | Your employees feel fairly dealt with regarding money, advancement, and recognition. | You ensure that your rewards and incentives don't get in the way of employees' doing the right thing. |
| 5 | Processes | There is no need to go around the system to get things done at your organization. | Your internal business processes encourage long-term thinking (for example, strategic planning, project planning). | The way things get done at your organization is clear to employees. | Your planning and reporting processes (for example, account planning, management reporting) encourage a focus on your customers. |

Worksheet: Your Trust Roadmap

The Trust Roadmap shows specific ways that the trust principles manifest, or not, at the organizational level. It identifies key areas for concern and action. Use it to diagnose the current status of your organization and to clearly identify priorities for a trust initiative.

Using the framework below, and the examples in this chapter, create your own custom Trust Roadmap. Design it with at least one entry per cell.

| | | A | B | C | D |
|---|---|---------------|----------------------------------|--------------|-------------|
| | | Collaboration | Medium- to Long-Term Perspective | Transparency | Other Focus |
| 1 | External Relationships. How your organization relates to other organizations. | | | | |
| 2 | Leadership. How your leaders behave, both within and outside the organization. | | | | |
| 3 | Structure. How your organization is set up to get work done. | | | | |
| 4 | Rewards. How virtues and values are positively reinforced. | | | | |
| 5 | Processes. How work actually gets done. | | | | |

Use surveys, focus groups, interviews, or a combination to determine how well your organization scores.

What are your organization's strengths?

What are the critical areas for improvement?

What actions will you take as a result?

| | Function | | | |
|--------------------------|----------|----|-------|---------|
| Area of Opportunity | HR | IT | Legal | Finance |
| 1. Credibility | √ | | | |
| 2. Reliability | | √ | | |
| 3. Intimacy: Empathy | | √ | √ | √ |
| 4. Intimacy: Risk-taking | | | √ | √ |
| 5. Self-orientation | √ | √ | √ | |

Figure 30.1

Five Trust-Enhancing Areas of Opportunity

Worksheet: Perception Is Reality

Understanding and accepting how you are perceived in your internal staff function is the first step in building trust within your organization.

Consider the following questions. This is an excellent team exercise.

How is your staff function perceived by the organization as a whole? Be honest in your responses; not wishful. Consider key stakeholder groups when you do your analysis, and what relationship strengths and weaknesses they see in you.

What do they say about you? In what ways do they (or don't they) involve you in strategic conversations or projects? How would you characterize the majority of your relationships with members of that group?

| Stakeholder Group | Relationship Strengths (Their Perception) | Relationship Weaknesses (Their Perception) |
|-------------------|--|---|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

Envision the *desired future state*: How do you want to be perceived? Involved? Related to? Write a vivid description.

How might your function *collectively build trust* within the organization as a whole?

In what ways can you *personally build trust* with your stakeholders?

Tip: Share your assessment and ideas with your stakeholders, and get their feedback.

Worksheet: Design for Success

Consider the design of your organization's existing or planned trustworthiness training. Which best practices for setting off the aha are included?

- ☐ Use simple frameworks.
- ☐ Provide out-of-character experiences.
- ☐ Fail forward.
- ☐ Tell stories.
- ☐ Encourage the tough conversations.
- ☐ Link in real-life situations.
- ☐ Incorporate personal feedback.
- ☐ Make time for reflection.
- ☐ Mix up learning groups.

For the best practices that you have checked, what's working well? Why?

What might you consider revising or adding?

In what ways does your design make provisions for sustaining aha moments?

- ☐ Set up action learning groups or learning labs.
- ☐ Arrange check-in calls and office hours.
- ☐ Schedule teach-back assignments.
- ☐ Create online learning communities.
- ☐ Continue learning with book clubs.
- ☐ Present 60- to 90-minute webinars to refresh and advance lessons.
- ☐ Set up peer coaching.
- ☐ Arrange professional coaching.
- ☐ Repeat personal assessments.
- ☐ Provide mastery programs for select leaders.
- ☐ Train-the-coach/train-the-trainer.

Consider your organizational strategy and culture, along with time, budget, and resource constraints. In what ways is the mix you have selected well-positioned to support your efforts?

What might you consider adding or revising?