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Sealing a deal! Two Business people shaking hands after Welcoming partners finishing up a meeting or ... More setting goals and planning way to success in the office.getty Dan, the tech man, didn't go to college. I saw that on his resume, and it made me hesitate. We had been through a few tech professionals in the past years who had been disappointing. We really did not want to fill this position once again. Even though he lacked that college degree, he had years of experience and training. He knew what he was doing and was an expert in his field. His work was consistently good, and he was easy to get along with. Everyone I liked Dan. He wasn't in management but quickly became our trusted tech advisor. What Impact Do Trusted or Untrusted Advisors Have on an Organization? In a trust study published in The Trifecta of Trust, I gathered data from 2,571 individual contributors from Marketing, Operations, HR, Finance, Product Development, Legal, Engineering, IT, and Research and Development. These people were all asked by their organizations to participate in a leadership development program for leaders even though they were individual contributors. Because they were asked to participate in a leadership development effort, I concluded that these were most likely knowledgeable professionals respected in their field. Despite not being in a management position, these individuals were rated significantly higher on their trust (other leaders 50.3, Trusted Advisors 55.0, t-value 8.111, Sig. 0.000). But, not all these trusted advisors were more trusted. In Zenger Folkman's 360-degree assessment, each person was evaluated on their level of trust using feedback from all other raters with their self-assessment data excluded. I compared the results for those whose trust ratings were at the bottom 10% (166 people) to those in the top 10% (277 people) with assessments from all raters, managers, peers, and the person themselves. The graph below shows the comparison between the most trusted and the least trusted advisors. What was observed in the data? - In the managers' ratings, managers were most likely expected to provide feedback, but their perceptions of the trust levels in these trusted advisors might not have been as critical or positive as the overall results suggest. MORE FROM FORBES ADVISOR - The lowest trust self-ratings indicate that these individual contributors recognized they had some issues with trust but didn't realize the severity of the problem. - The highest trust self-ratings were at the 55th percentile reflecting a lack of understanding about how trusted they really were.Trusted AdvisorsZenger Folkman Actions that Will Enable Individuals to Become Trusted Advisors This research shows that you don't need to be a leader for others to consider you a trusted ally. Our research on trust has taught us there are three factors that are best at building trust. The first is positive relationships. We trust our friends and distrust our enemies. The second most important factor is consistency. When people do what they say they will do and keep their promises to others, they are trusted. The third is expertise and good judgment. We trust people who have the correct answers and can solve difficult problems. Analyzing data comparing the most to least trusted advisors, I identified the top seven behaviors that can help individuals build trust. 1. Being a role model and walking your talk. Some trusted advisors believe they do not need to follow the rules that apply to most others in the organization. This behavior destroys their credibility. Often, they make commitments and fail to deliver when problems are more difficult to solve than they expected. These behaviors destroy trust. 2. Having good judgment and correctly diagnosing problems. It is surprising how long a poor diagnosis or a problem will follow a person around. Trusted advisors need to take their time and provide careful diagnoses of problems and potential solutions. 3. Understanding the issues and concerns of colleagues. Too many trusted advisors remain aloof to the difficulties and problems their colleagues are experiencing. This damages relationships, which negatively impacts trust. 4. Cooperating with other colleagues and groups. Many trusted advisors act independently with the expectations that other groups and individuals need to accommodate their approaches and decisions. This negatively impacts relationships and destroys trust. 5. Balancing the need to deliver results with the needs of individual team members. Consideration for other team members builds positive relationships, which also increases trust. 6. Following through on commitments. It is easy to say, "I will do that!" But while we may often forget our commitments, those we make commitments to tend to remember them. Trusted advisors need to be careful to make only commitments they are confident they can fulfill. 7. Staying current with technical knowledge and expertise. Many people think school is where most of their learning occurred, but that technology is continually changing. And to stay current with all that is changing, every person needs to be continually learning. After being in the job for several years, many people get comfortable and fail to stay current with new innovations. This damages their expertise which creates a loss of trust. Trusted Advisors Are in the Dark about How Much or Little They Are Trusted In the research with leaders and individual contributors, we have learned that the worst person at evaluating weaknesses or brilliance is that person themselves. Their manager, peers, direct reports, and others see them much more clearly and accurately than they see themselves. The evaluations from different raters are consistent and contain useful insights. A 360-assessment is a great value for a person to understand how they are viewed by others. Rather than a fickle evaluation from others, it is a highly predictive assessment that is strongly correlated with performance. Trusted advisors need accurate information on how trusted they are and their effectiveness on the factors that influence trust. I strongly recommend that every trusted advisor participates in a 360 assessment that will provide them with an accurate assessment of both their level of trust and the behaviors that improve trust. Skip to main content Powered by AI and the LinkedIn community As a management consultant, you want to build long-term relationships with your clients and become their go-to source of expertise and guidance. But how do you establish yourself as a trusted advisor, someone who can influence their actions, and not just a hired hand who delivers reports and recommendations? This article will explore six key aspects of becoming a trusted advisor. COO | CFO | Advisor | Investor | Harvard MBA The real first step is to be vulnerable as an advisor. Your client has a vulnerability -- that's why they need you! -- and that's a real opportunity to connect deeply, empathize, and build trust. Be real about the lessons you've learned and how you can help your client get through this matter. 5 To become a go-to guru for your clients, get to know their dreams and headaches well. Chat with them like a friend but think like a detective. Your goal? Spot opportunities to make their life easier. Don't just nod, listen. Speak their language and keep them in the loop. Be their win--solve their problems better than anyone else. If you goof up, you can own it and fix it. Integrity is your business card, so act like a real-life hero: be honest, fair, and consistent. By putting their needs first, you're not just an advisor but their trusted right hand. 5 There are many ways to build trust. Asking great questions is one of them. At every stage of the relationship, asking the right question at the right time will help establish yourself as a trusted advisor. If you're interested in learning how to ask better questions as an advisor, then read "DISCOVER Questions" by Deb Calvert. It's a book designed for sellers, but consultants will find tremendous value in using it even during client engagements. The book breaks down various types of insightful questions you can ask for every situation, specifically, D - Data questions I - Issue questions S - Solution questions C - Consequence questions O - Outcome questions V - Value questions E - Example questions R - Rationale questions 2 Emotional intelligence plays a big role in establishing trust. Understanding attachment styles, reading between the lines, getting to the root of the need are key to growing trusting and valuable relationships. Additionally always being true to yourself provides consistency for the client in the relationship. 2 The fact finding portion of the process is crucial. I tell my clients I can't help them if I don't have the whole picture. I share with them examples of how this portion stacks to the estimated outcomes. I share vulnerabilities that allow them to get comfortable with sharing the severity of a situation or project. It allows us to build trust early on with both parties. 2 Deliver results: Consistently deliver high-quality work and tangible results that align with clients' expectations. Meet deadlines, exceed performance targets, and focus on delivering value. Your track record of success will enhance your reputation and establish trust. 2 Trust is built over time, so it is essential to consistently demonstrate your expertise, reliability, and commitment to the success of those you advise. I COO | CFO | Advisor | Investor | Harvard MBA An advisor needs to stay in "complete lockstep" with his/her client on what the desired deliverable is supposed to be. Poor communication, lack of experience, and/or other commitments -- on either side -- leads to expectations gaps and poorly received deliverables. Why not to exceed the client's expectations and always try to be one step ahead? Nowadays, clients expect us to anticipate their needs, expectations,
questions, etc., and provide solutions, answers, or whatever before they even ask. Throughout the project I am treating that company as if it were mine and with much care on it, and as if those involved are stakeholders. With each report I am asking "how does this work meet your expectations thus far?" There are stages to the MC process, right? So I am doing a pulse check along the way. COO | CFO | Advisor | Investor | Harvard MBA Understand and respect your client's communication style. Some clients want the direct truth with no varnish...while others prefer a gentler approach. It's a partnership, and refining and optimizing the style of communication is vitally important. 2 Communicate effectively. Clearly and concisely communicate complex ideas and concepts to clients. Tailor your communication style and language to match their needs and preferences. Avoid jargon and technical terms that may confuse or alienate your clients. As a consultant, we should remember to communicate not negotiate with clients. It is crucial to understand the distinctions between "negotiation" and "communication." As consultants, we should prioritize effective communication with clients rather than negotiation. I believe the key here is educating. Your client so they not only feel informed, but that they could educate others in their business about the topic/advise. I dislike consultants that create a crutch for the companies they support. Though great education consultants should empower the companies they support. Communication in the MC process requires not just top down but bottom up communication. I share what is happening, when, how, where and expected difficulties along the way. I am constantly seeking feedback and if it's a project that is going to be implemented after my involvement, I am making sure those teams are set up for success, coaching them on implementation strategies and allowing them to voice concerns, doubts or fears along the way. There is a key element in building rapport and trust with clients and that is: "Make It About More than Money" When it comes to building strong relationships with clients, there is a crucial factor that should never be overlooked: creating a connection that goes beyond financial transactions. By showing genuine interest in their needs, concerns, and goals, you can establish a deeper level of trust and rapport that will not only benefit your business in the long term but also help you provide more meaningful solutions to their problems. 2 Build rapport and relationships: Foster strong relationships with your clients based on trust, respect, and effective communication. Take the time to understand their goals, challenges, and priorities. Show genuine interest in their success and be attentive to their needs. I COO | CFO | Advisor | Investor | Harvard MBA This goes back to being vulnerable as an advisor. Showing that you, like everyone, are fallible, but have (a) learned from those mistakes and (b) importantly not made them again, allows your client to know that he/she can open up and trust your guidance. In my experience, putting together a solid plan, and then executing to that plan and delivering the results that the client is looking for is the key to a win-win for everyone. It's making sure you have taken the time in the initial engagement to put together the actual outcomes that they are looking for, and that they are agreed-upon by all parties. 8 Demonstrate empathy and emotional intelligence: Understand and empathize with your clients' perspectives, challenges, and emotions. Show empathy when discussing sensitive topics or difficult decisions. Emotional intelligence allows you to build strong connections and navigate client relationships effectively. 4 Develop an actual process to approach the client's business activities. Don't just show up and "give advice." Write things down and take responsibility. 3 I think one of the key roles as an advisor is to hold your clients to account. Yes you are there to advise and deliver. But, I believe the real value and longevity of a relationship is built by lifting up your client and ensuring that they deliver their goals by helping them focus. 2 Master your field. Immerse in your field completely. Learn as much as you can, starting from the history of your field, the most important frameworks and concepts that have defined the field from the past until the present. Seek out other experts and learn from them. Subject yourself to the toughest clients and audiences to further sharpen and hone your skills. And most importantly, practice what you preach. Projects, clients and so on). Think about the hours you've spent working on proposals, talking with clients, planning executions and managing projects. Seeing what you know will increase your confidence to advise and believe in what you have to offer. And that confidence will improve your job performance overall. In fact, 90% of workers surveyed by Indeed said they performed better when they felt confident. While clients might have the last say, that doesn't take away from your expertise. Start recognizing -- and being proud of -- what you bring to the table. 2. Become a genuine, active listener! If you want to take on a more advisory role, you need to understand the client's situation before making recommendations. That requires active listening. Consider the example of when I started running and went to the store to get a pair of running shoes. The choices felt endless. The sales associate could read the uncertainty on my face, so he approached me with one question: "New to running?" 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