



How to Increase Trust in Your Professional Relationships

Revolution Company Professional Development Series

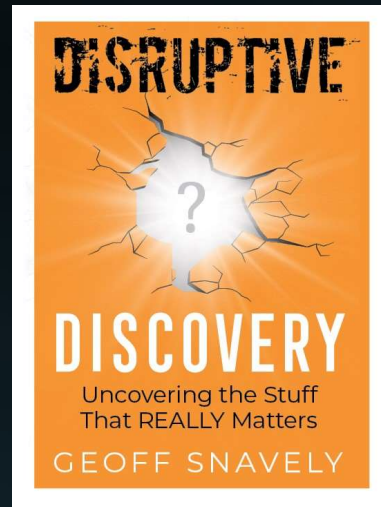
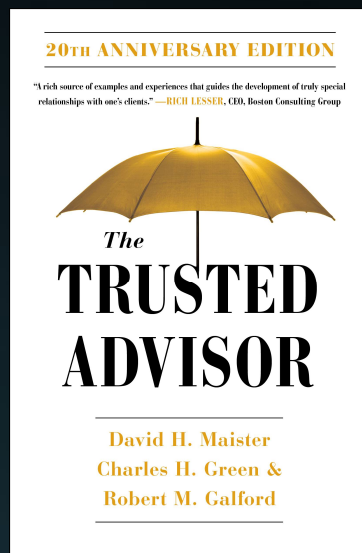
August 2, 2023

Welcome and Engagement Expectations

- This Professional Development session is being recorded
- You will receive a copy of the presentation and resources
- Keep tools available during session: 79 Ways to Build Trust With Colleagues
- Be a “chatterbox” (get it?): Use Chat for sharing ideas and interaction
- Questions? Bring ‘em on! Post in Chat, raise your hand, or say “Yo, Geoff!”
- Cameras are your call...but it’s great to see you out there

We’ll learn a lot together (and maybe laugh a little too!)

www.trustedadvisor.com



Trusted Advisor Associates and Disruptive Discovery

● www.trustedadvisor.com

- 20 years helping business professionals build stronger trust relationships
- Workshops, online learning, custom programs, coaching

Vice President – General Manager and part-owner, MilliCare by EBC Carpet Services

BS in Textile Management, Masters Degree in Organization Development, Associate Facilitator for Trusted Advisor Associates

*Author of **Disruptive Discovery: Uncovering the Stuff That Really Matters**, well-intentioned contrarian, and a byproduct of an ill-advised KISS/Neil Diamond smoothie*



About Geoff

A Moment of Truth ...

A “Trust Epiphany”

AGENDA

Being Trustworthy

Mutual Concern Mindset

Trust in Action



How we will translate learnings into action

Think about a challenging professional relationship...

- This could be a co-worker, member of your team, or someone in leadership...
- In a CURRENT situation...
- Where the level of trust isn't where it could be...
- And you're comfortable sharing details.



After further reflection...

If more trust existed in this specific relationship, what would be better?



“Note to Self”
(in other words...write it down)

AGENDA

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What comes to mind when
you think of the word
TRUST?



Chat

The trust(worthiness) equation

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

TRUSTWORTHINESS

Credibility

Reliability

Intimacy

Self-orientation

Source: *The Trusted Advisor* by Maister, Green, and Galford, The Free Press, 2000



79 WAYS TO BUILD TRUST WITH COLLEAGUES

Using the [Trust Equation](#) from the books [The Trusted Advisor](#) and [The Trusted Advisor Fieldbook](#), discover 79 specific ways to increase the level of trust in your business relationships. Which one will you put into practice today?

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

C: Credibility R: Reliability I: Intimacy
S: Self-orientation

Credibility exists in the domain of words. It is created through your credentials, truthfulness, and how you present yourself.

CREDIBILITY

WORDS

"I can trust what she says about..."
Credentials
Truthfulness

- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Know about industry trends and info, business news 2. Take the initiative to expand your knowledge 3. Ask great questions 4. Write about your areas of expertise—articles, blogs, white papers 5. Express your passion for your subject 6. Host an event that brings key stakeholders together; be the moderator 7. When you present, practice, practice, practice so your delivery is relaxed 8. Use metaphors, stories, and vivid examples to share your ideas, prove your point | <ol style="list-style-type: none"> 9. Offer your point of view when you have one 10. Share the "why" behind your point of view 11. Be articulate and thoughtful when you express yourself 12. Find ways to demonstrate your expertise; don't just talk about it 13. Say "I don't know" when you don't know 14. Never ever lie 15. Report regularly on project progress/measures 16. Combine your words with presence—a firm handshake, eye contact, confident air 17. Be humble; remember there is always more to learn |
|--|--|

Reliability occurs when you prove yourself dependable and predictable over time.

RELIABILITY

ACTIONS

"I can trust him to..."
Dependability
Predictability

- | | |
|--|---|
| <ol style="list-style-type: none"> 18. Set expectations up front and report on them regularly 19. Be prepared for meetings 20. Be at least on time if not early 21. Be unbelievably responsive 22. Make lots of small promises and consistently follow through 23. Announce changes immediately and acknowledge the impact—especially when you won't deliver as promised | <ol style="list-style-type: none"> 24. Create documents and deliverables with a consistent look and feel 25. Be rigorous about using good business practices, such as meeting agenda and notes 26. Use others' terminology and templates 27. Establish routines in your relationships (regular meetings, emails, etc.) 28. Reconfirm scheduled events 29. Only cancel if you absolutely must 30. Dress appropriately |
|--|---|

79 Ways to Build Trust With Colleagues

- Credibility
- Reliability
- Intimacy
- Self-Orientation


Credibility relates to our WORDS

Credibility

Words



Credentials
Truthfulness

I trust what they say about...






How might you **CREDIBLE** your **CREDIBILITY**?

Reliability is about our ACTIONS

Credibility	Reliability
Words	Actions
Credentials Truthfulness I trust what they say about...	Dependability Predictability I trust them to...
	





How might you ~~be~~ ~~able~~ ~~to~~ ~~earn~~ ~~every~~ ~~one's~~ ~~RELIABILITY?~~

Intimacy is about creating SAFETY

Credibility	Reliability	Intimacy
Words	Actions	Safety
Credentials Truthfulness I trust what they say about...	Dependability Predictability I trust them to...	Empathy Risk-taking Discretion I trust them with...
		





How might ~~SAFETY~~ increase ~~TRUST~~ **INTIMACY**?


Self-orientation relates to our FOCUS

Credibility	Reliability	Intimacy	Self-Orientation
Words	Actions	Safety	Focus
Credentials Truthfulness I trust what they say about...	Dependability Predictability I trust them to...	Empathy Risk-taking Discretion I trust them with...	Motives Attention I trust that they care about...
			

How might you increase **FOCUS** on them?

Reflect on your challenging relationship: which two factors of trustworthiness are most important to improve?

Words	Actions	Safety	Focus
Credibility	Reliability	Intimacy	Self-Orientation
Truthfulness Credentials I trust what they say about...	Dependability Predictability I trust them to...	Discretion Empathy Risk-taking I trust them with...	Motives Attention I trust that they care about...
			

 Mark your selections.

Trust in Action

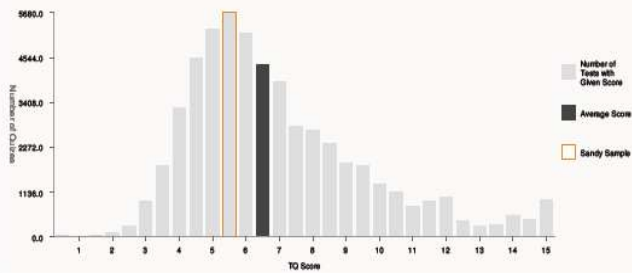
Consider your challenging relationship

- What is **one action** you are willing to take to build trust in this relationship?
- What specific date will you commit to taking action? (Hint...within the next week might be a good thing)
- “Note to Self” (put it in writing!)

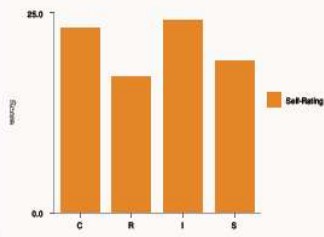


Trust Quotient Personal Report for: Sandy Sample

SECTION I: YOUR TRUST QUOTIENT IS 5.8 (SELF-SCORED)



SECTION II: YOUR COMPONENT SCORES



You rated yourself:
Credibility: 23 | Reliability: 17 | Intimacy: 24 | Self-Orientation: 19

SECTION III: YOUR TRUST TEMPERAMENT™ (SELF-SCORED): THE CATALYST

The Trust Quotient

- Developed by Charles H. Green based on the Trust Equation
- Taken by over 250,000 people
- A quantitative indicator of *trustworthiness*

AGENDA

Being Trustworthy

Mutual Concern Mindset

Trust in Action



Bringing the right mindset

- Internal mindset = It's all about ME
 - Win-Lose
- External mindset = It's all about THEM
 - Lose-Win
- We are predisposed to one or the other (50/50)
- Is there a better approach? Let's call it the *only* approach.

Drumroll please...



Mutual Concern

The win-win mindset


Care for the shared interests of
EVERYONE involved:

- Don't only protect what's *mine*
- Don't only give what's *yours*
- **Rally around what's *ours* together**

Mutual Concern in Practice

The proverbial Venn Diagram:

- Circle #1: What's most important to YOU?
- Circle #2: What's most important to THEM?
- **See any overlap?**
- **Conflicts?**



Five
Take-aways

Trust is personal

Intimacy is the key driver

Trust takes courage more
than time

Key skills: empathy,
vulnerability, curiosity

They trust your advice if
they trust you

AGENDA

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Guideposts for action

1. A **focus on the other** – for the other’s sake, not as a means to your own ends
2. A **collaborative approach** to relationships
3. A **medium- to long-term relationship perspective**, not transactional
4. A habit of being **transparent** in all your dealings (*except where injurious or illegal*)



What's *YOUR*
biggest
takeaway?



Chat

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82 WAYS TO BUILD CLIENT TRUST

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

C = Credibility **R** = Reliability **I** = Intimacy
S = Self-Interest

Credibility exists in the domain of words. It is created through your credentials, truthfulness, and how you present yourself.

1. Be diligent about research.
2. Know about industry trends.
3. Take the initiative to educate your clients.
4. Ask great questions.
5. Write about your areas of expertise.
6. Express your passion for your work.
7. Host an event that brings people together.
8. When you present, plan so your delivery is relevant.
9. Use metaphors, stories, and analogies.

CREDIBILITY WORDS

"I can trust what she says about..."

- Credentials
- Truthfulness

Reliability occurs when...

19. Set expectations up front.
20. Be prepared for meetings.
21. Be at least on time if not early.
22. Be unthinkingly responsive.
23. Make lots of small promises.
24. Announce changes in plans and acknowledge the impact.

RELIABILITY ACTIONS

"I can trust him to..."

- Dependability
- Predictability

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Trust in Action

“Do Something” Principle: Why wait?

1. **Start by taking 1 meaningful action** to build trust in your challenging professional relationship (within the next week?)
2. **Extra Credit:** Experiment during the next month to improve in the trustworthiness component you feel would make the biggest impact

Was this a difference-making learning experience?



Questions & Comments



Trusted Advisor Resources

www.TrustedAdvisor.com

- Podcasts
- Blogs
- eBooks
- Videos



FREE WEBINAR Are You Stealing Your Client's Spotlight?

Hosted by: Craig Choffe

August 10 | 11AM EDT

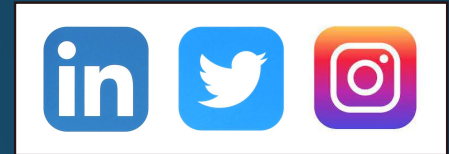
- ✓ Recognize when you need to get your "S" in check
- ✓ Two critical trust-builders to stay focused on them
- ✓ Action tips to increase client intimacy

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Trusted Advisor Academy
www.education.TrustedAdvisor.com

Get trust tips and join the conversation on social media



Share the Trust Quotient
www.TrustSuite.TrustedAdvisor.com

How Trustworthy Are You? Take Our Quiz and Gain Powerful Insight.

- Gain the benefits of learning how to build trust in relationships
- Learn to leverage your strengths and improve your opportunities
- Benefit from valuable tools to build trust and build business

Thank you!

You'll receive this presentation and other resources via e-mail



Geoff Snavelly
Associate Facilitator, Trusted Advisor Associates
Vice President – General Manager, MilliCare Floor and Textile Care
geoffs@ebcusa.com

AGENDA

- **Defining Trust**
- Being Trustworthy
- Mutual Concern Mindset
- Trust in Action

Defining trust



Trust is a personal,
bi-lateral relationship:

$$\begin{array}{l} T^1 \\ \text{Trusting} \\ + \\ T^2 \\ \text{Trustworthy} \\ \hline = \text{Trust} \end{array}$$

Introductions ... with a twist

3. Number of months in current role

1. Name
2. Role in company

4. Something we'd be surprised to know about you*
(or your favorite movie)

*And you wouldn't mind if everyone knew

Being a trusted advisor requires both trusting and trustworthiness.

T¹
Trusting

+

T²
Trustworthy

= Trust

The most pervasive myth about trust



Reliability is the only trust component that takes time ...

... and you can *accelerate* it:

- Make lots of small promises
- Be on time
- Be consistent with their norms



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CREDIBILITY & RELIABILITY

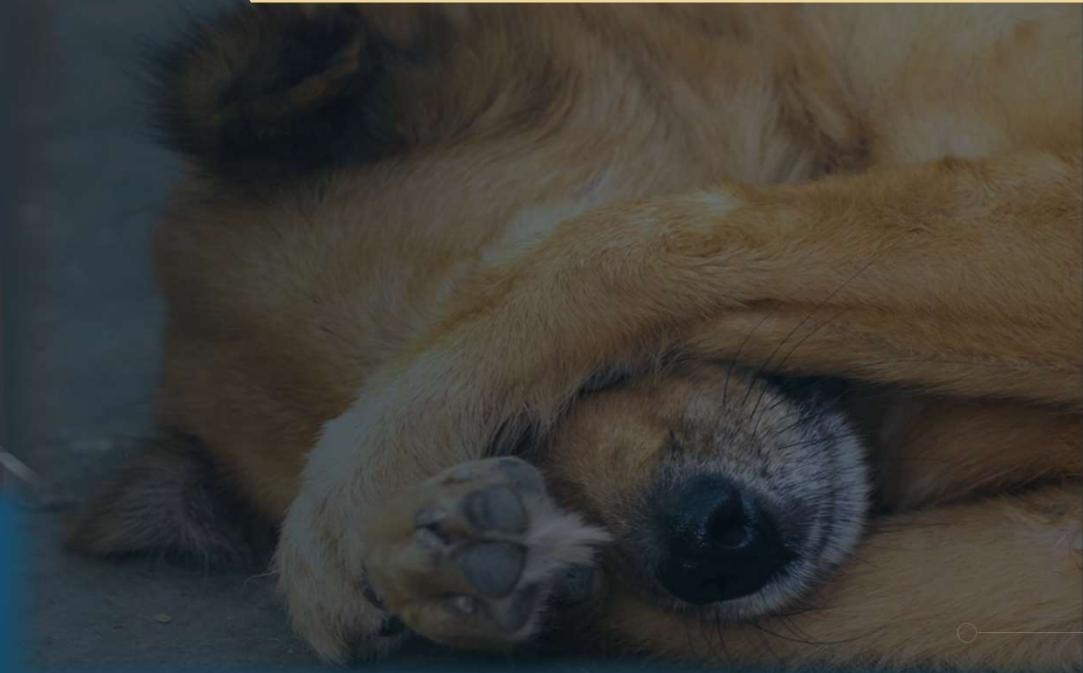
Self-reflection (2 minutes)

Which of the ways to *increase Credibility and Reliability* might you put into action to build trust in your challenging relationship?

Two kinds of self-orientation



Attention: Self-obsessed



Motives: Selfishness



Self-orientation Behaviors

HIGH Self-Orientation	LOW Self-Orientation
<ul style="list-style-type: none">▪ Tries to appear knowledgeable, experienced, smart, witty, etc.▪ Says what others want to hear and sugarcoating bad news.▪ Difficulty admitting mistakes and finds others to blame for failures.▪ A need to be right or have the last word▪ Listens with an agenda▪ Jumps to problem solving and offering solutions before listening	<ul style="list-style-type: none">▪ Honest and candid about strengths AND weaknesses & limitations▪ Asks at the beginning of a meeting what the other person would like to discuss▪ With an existing or potential client, willing to make a referral to a competitor▪ Gives a direct answer to a direct question▪ Freely gives others credit for successes▪ Seeks out feedback that is honest, specific, and actionable

82 WAYS TO BUILD CLIENT TRUST (CONT.)

Intimacy exists in the domain of *emotions* and emotional connectedness. It includes a visible demonstration of empathy, discretion, and personal risk-taking—all of which make it possible for clients to flourish in a comfortable and safe working environment.

INTIMACY

SAFETY

"I can trust her with ..."

Discretion

Empathy

Personal Risk-Taking

- | | |
|--|--|
| <ul style="list-style-type: none"> 32. Be relentlessly discreet; honor confidentiality 33. Address your client by name 34. Adopt a friendly tone 35. Ask something personal 36. Ask others about their feelings 37. Share something personal 38. Tell your client something you appreciate about him/her 39. Use colloquial language 40. Be willing to show your emotions (elation, frustration, etc.) 41. Acknowledge uncomfortable situations 42. Send a hand-written note of acknowledgment/thanks 43. Make the first move 44. Ask open-ended questions 45. Use expressive/friendly body language | <ul style="list-style-type: none"> 46. Practice different ways of asking difficult questions or making difficult statements before you deliver them 47. Take responsibility for mistakes 48. Hold others accountable 49. Write your next proposal with your client 50. Be candid—Name it and Claim it! 51. Don't gossip or promote relationship "triangles" 52. Think in advance of how your client is likely to react 53. Talk more with your eyes, ears and body, and less with your mouth 54. Be empathic in all your interactions; practice Three-Level Listening 55. Celebrate success with your client 56. Extend yourself—e.g., invite your client to meet you outside of work, share a meal 57. "Be yourself. Everyone else is already taken." |
|--|--|

To be other-oriented is to be consistently focused on your client's wants and needs.

OTHER-ORIENTATION

FOCUS

"I can trust that she cares about..."

Motives

Attention

- | | |
|--|---|
| <ul style="list-style-type: none"> 58. Find out how your project team defines success and how you can help them achieve it 59. Don't jump to problem-solving—slow yourself down by counting, taking notes, vocalizing expectations 60. Set aside the "spin" 61. Let go of trying to appear clever, bright, witty 62. Be self-deprecating 63. Confront issues as they arise—being preoccupied with them keeps your attention on your own preoccupation 64. Answer direct questions with direct answers 65. Give voice to your fears 66. Know your own traps/triggers and manage them well 67. Don't interrupt 68. Watch a tendency to name-drop 69. Call your client just to find out how he/she is | <ul style="list-style-type: none"> 70. Eliminate your jargon from your conversations 71. Put the PowerPoint deck aside 72. Spend time in your client's shoes—imagine what it's like to be him/her; role play with a colleague 73. Cultivate an attitude of curiosity—think in advance about what questions you want to ask 74. Practice "thinking out loud" with your client 75. Let someone else have the last word 76. Be really honest even (especially) when it makes you look bad 77. Give others credit for successes 78. Skip the "blame game" 79. Take responsibility for failed communications 80. Deliver "early and ugly"—collaborate and iterate 81. Be willing to make a referral to your competition 82. Step down when your heart's no longer in it |
|--|---|

INTIMACY & SELF-ORIENTATION

Self-reflection (2 minutes)

Which of the ways to *increase Intimacy and Other-orientation* might you put into action to build trust in your challenging relationship?



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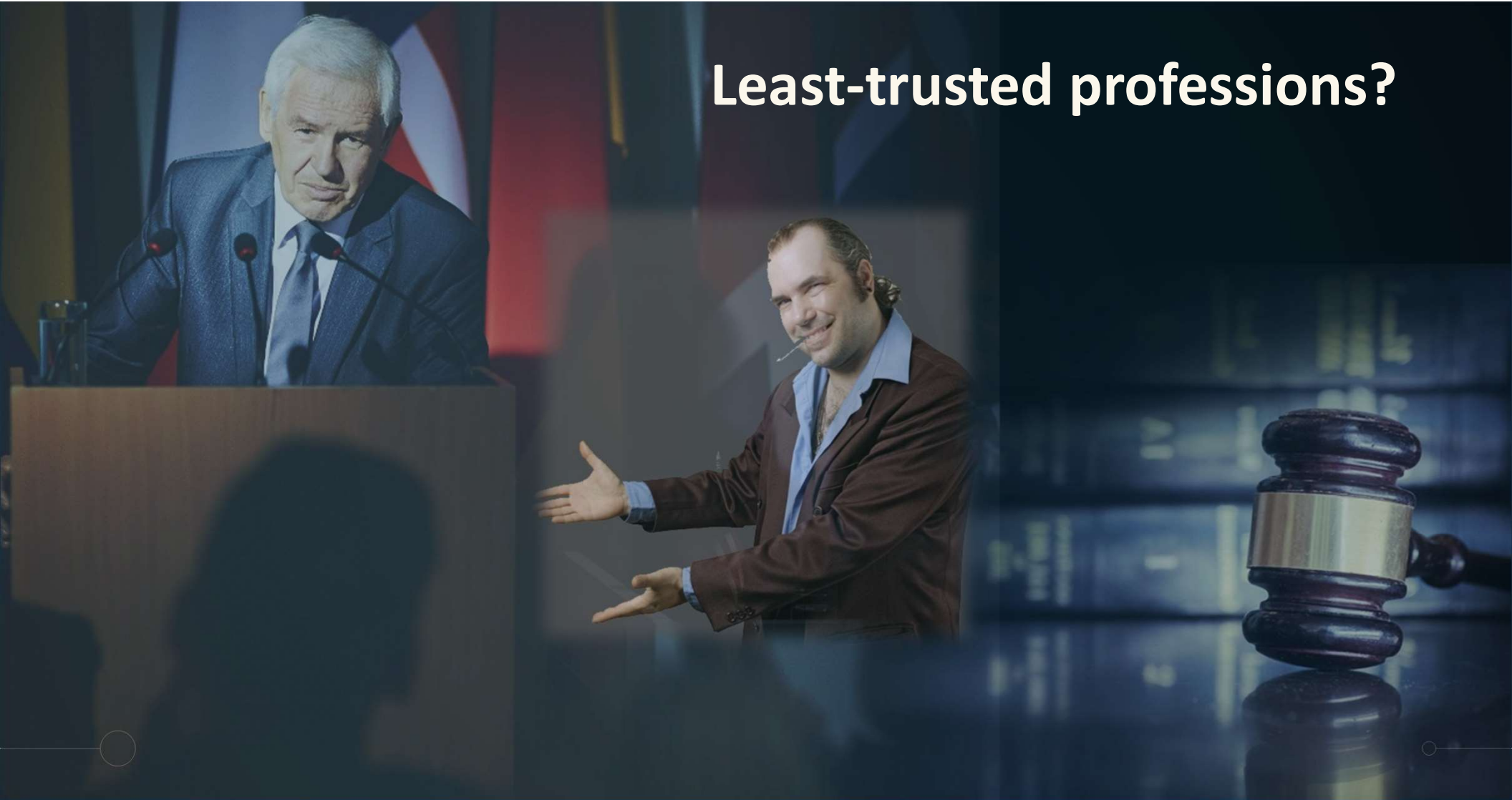
Trust in Action Challenge #1

Self-reflection

Discuss for 3 minutes:

- In your area of greatest opportunity...
- Pick 1 idea you will experiment with over the next month...
- “Note to Self”: commit this next step to yourself in writing, specifically where and how you might apply it

Least-trusted professions?



Most-trusted profession?

The strongest driver

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

