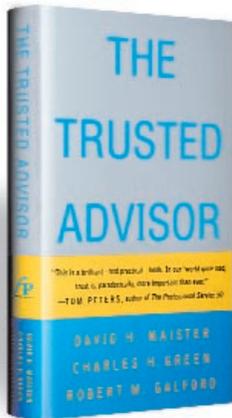




Executive Book Summaries®



By David H. Maister, Charles H. Green and Robert M. Galford

How to Create Trust-Based Relationships with Your Clients

THE TRUSTED ADVISOR

THE SUMMARY IN BRIEF

Do you ever find yourself asking one or more of the following questions:

- How can I get access to my clients more often?
- How can I cross-sell?
- How can I avoid being typecast, labeled as a specialist only in my main discipline?
- How do I get clients less focused on price?
- How do I get clients to play fairly with me?

The answers to these and other similar questions have the same basis — you must earn your client's trust; without trust, none of these ambitions can be realized. The authors of *The Trusted Advisor* know this truth from shared and individual experience, and they use that experience to both illustrate the need for trust in long-term client relationships and educate readers in the process of developing that trust with every interaction.

Among the things they reveal are:

- The distinct attributes of trusted advisors.
- The three core skills of trusted advisors: earning trust, giving advice and building relationships.
- The essential characteristics of trust in all business endeavors.
- How to develop trust in five essential stages: engaging, listening, framing, envisioning and committing.
- How to define client problems in a way that provides insight and a fresh way of thinking, both in rational and emotional terms.
- How to add value to a client's business by helping them envision an alternate reality — an ideal state in which their main problem is solved and their goals within and beyond the context of that problem are defined.
- How to build commitment to action and carefully manage your client's expectations of what will be required to solve his or her problem.

Are you ready to build stronger, more trusting relationships with your clients? If your answer is "yes," turn the page and get started ...



CONTENTS

What Is a Trusted Advisor?

Page 2

The Three Core Skills of Trusted Advisors

Pages 2, 3, 4

What Is Trust?

Page 4

The Development of Trust in Five Stages

Pages 4, 5, 6, 7

What Good Listeners Do

Page 5

What's So Hard About All This?

Page 7

The Lieutenant Columbo Approach

Pages 7, 8

The Quick-Impact List to Gain Trust

Page 8

THE TRUSTED ADVISOR

by David H. Maister, Charles H. Green and Robert M. Galford

— THE COMPLETE SUMMARY

What Is a Trusted Advisor?

A common trait of trusted advisor relationships is that the advisor places a higher value on maintaining and preserving the relationship itself than on the outcome of the current transaction. The advisor makes a substantial investment in the client, without guarantee of return, before the relationship generates any income, let alone any profit.

Sports agent David Falk helped create and build basketball superstar Michael Jordan into one of the world's most successful "brands." Falk has been able to sustain his relationship with Jordan in part because he has earned Jordan's trust, sacrificing guaranteed financial reward in order to grow the relationship. On two occasions (including once early in Jordan's career) Falk waived or significantly reduced specific fees, without being asked by Jordan, because he knew instinctively that it was what his client wanted — although Jordan himself would never have made such a request. Falk believes that is one of the reasons the two continue to work together, with Falk collecting four percent of Jordan's enormous earnings.

Trusted advisors tend to have a number of distinct attributes:

- They have a predilection to focus on the client, rather than on themselves.
- They focus on the client as an individual, not as a person fulfilling a role.
- They believe that a continued focus on problem definition and resolution is more important than technical or content mastery.
- They show a strong competitive drive aimed not at competitors, but at constantly finding new ways to be of greater service to the client.
- They consistently focus on doing the next right thing, rather than on specific outcomes.
- They are motivated more by an internalized drive to do the right thing than by their own organization's rewards or dynamics.
- They view methodologies, models, techniques and business processes as means to an end — they are useful if they prove effective for this client, and are discarded if they don't.
- They believe that success in client relationships is tied

to the accumulation of quality client-contact experiences.

- They believe that both selling and serving are aspects of professionalism; both prove a dedication to helping clients with their issues.
- They believe that there is a distinction between professional and private lives, but that both lives are very personal. The two worlds are often more alike than they are different — and for some people, these worlds overlap to an extraordinary extent. ■

The Three Core Skills of Trusted Advisors

In addition to the distinct attributes of trusted advisors listed above, we see three core skills emerge: the ability to earn trust, the ability to give advice and the ability to build relationships.

Skill #1: Earning Trust

Trust must be both earned and deserved. You must do something to give people evidence that helps them decide whether to trust you. You must be willing to give in order to receive.

David Maister once had to hire a lawyer to probate a relative's will. He called several law firms and was treated to sales pitches about when the firms were founded, what they would charge and how many offices they had. Finally, he found a lawyer who, in the initial phone call, asked Maister how much he knew about probating a will. He then offered to fax Maister a comprehensive outline of the steps involved, including which ones to prioritize based on their urgency in the

(continued on page 3)

The authors: David H. Maister is a leading authority on the management of professional service firms. Charles H. Green is a consultant and executive educator. Robert M. Galford is Executive Vice President and Chief People Officer of Digitas, Inc., a leading internet professional services firm.

From THE TRUSTED ADVISOR by David H. Maister, Charles H. Green and Robert M. Galford. Copyright© 2001 by David H. Maister, Charles H. Green and Robert M. Galford. Reprinted by permission of The Free Press, a Division of Simon & Schuster, Inc. 240 pages. \$25. 0-7432-0414-X.

To subscribe: Send your name and address to the address listed below or call us at **1-800-521-1227**. (Outside the U.S. and Canada, 1-610-558-9495.)

To subscribe to the audio edition: Soundview now offers summaries in audio format. Call or write for details.

To buy multiple copies of this summary: Soundview offers discounts for quantity purchases of its summaries. Call or write for details.

Published by Soundview Executive Book Summaries (ISSN 0747-2196), 10 LaCrue Avenue, Concordville, PA 19331 USA, a division of Concentrated Knowledge Corporation. Publisher, George Y. Clement. Publications Director, Maureen L. Solon. Editor-in-Chief, Christopher G. Murray. Published monthly. Subscription, \$89.50 per year in the United States and Canada; and, by airmail, \$95 in Mexico, \$139 to all other countries. Periodicals postage paid at Concordville, PA and additional offices.

POSTMASTER: Send address changes to **Soundview, 10 LaCrue Avenue, Concordville, PA 19331**. Copyright © 2001 by Soundview Executive Book Summaries.

The Three Core Skills of Trusted Advisors

(continued from page 2)

process. The lawyer provided this information freely, earning Maister's trust by being generous with this knowledge and proving he was willing to earn the potential client's business.

At its core, trust is about relationships; people tend to trust one another if they are convinced the other is in for the long haul and not looking simply to maximize the short-term benefit of individual interactions. Trust is about reciprocity; you help me and I'll help you if you exhibit some form of caring, and if you provide some evidence that my interests are as important to you as yours are.

Skill #2: Giving Advice

Many professionals approach the task of giving advice as if it were an objective, rational exercise based on their technical knowledge and expertise. Yet advice is not an exclusively logical process, but rather an emotional duet played between the advisor and client. If you cannot learn to recognize, process and respond to a client's emotions, you cannot be an effective advisor.

Consider the client's perspective in receiving advice, or in engaging professionals in general. Think about the personal risks (reputation, promotion opportunities, career issues) that accompany the responsibility for choosing and working with any outside provider for a risky or expensive engagement. If something goes wrong, the person who made the decision to go with the particular vendor or service organization is blamed; clients, therefore, tend to tread carefully when choosing professionals to handle their problems.

Because of this, the diagnosis and solution of a client problem cannot be performed without considering the sensitivities, emotions and politics of the client engagement. Regardless of how technical your field or discipline, the act of giving advice is dependent upon an intimate understanding of the personalities involved, and on the ability to adapt the advice-giving process to the specific individuals involved.

What clients frequently want is an advisor who will take away their worries and absorb all their hassles; what they often get, however, are professionals who add to their worries and create extra headaches by forcing them to confront things they would prefer to ignore. Since clients are often anxious and uncertain, they are looking for someone who will provide reassurance, calm their fears and inspire confidence. It can take some time for many advisors to recognize and develop the interpersonal skills required to address these concerns.

Once you have these skills down, you can begin the process of providing your client with valuable advice.

Keep the following points in mind:

- **Find the right words.** We aren't always aware of how we come across to clients in conversations. What we intend to convey is sometimes not what gets communicated. To help develop this skill, rehearse a client conversation, with a friend or colleague playing the role of the client. Look for occasions to rephrase things differently, to avoid the perception of being unclear or pompous.

- **Ask the right questions.** Like a good teacher, your role when giving advice is to get your client from point A (what they know and understand now) to point B (an advanced state or deeper understanding and knowledge). You must have a firm understanding of point A and be able to take the client, step-by-step, to point B through a logical reasoning process. This process is most often phrased as questions: "Why do you think we have this problem?" "What advantages do you foresee for the different options?" "What benefits will occur as a result of our approach?"

- **Be mindful of politics.** It is sometimes necessary to suppress your own ego and allow a client to believe they came up with a solution, to avoid the hassles of corporate politics. One way to do this is to help the client understand all available options by explaining the advantages and disadvantages of several courses of action, then making a recommendation. This enables the client to make an informed decision based upon that information and your opinion.

Skill #3: Building Relationships

To build a strong relationship, you must try to be understanding, thoughtful, considerate and supportive. Fortunately, there are some key principles of relationship building that apply both in personal and professional life. Among these are the following:

- **Go first.** You must give a favor to earn a favor, visibly displaying your willingness to make an investment in the relationship in order to earn the client's trust.

- **Show, don't tell.** A primary goal of any relationship-building activity is to create opportunities to demonstrate that you have something to contribute. For example, a professional firm, competing for business with Wells Fargo Bank, arranged for their proposal to be delivered in saddlebags. The same firm had a proposal for business with Domino's Pizza delivered by one of their people dressed up as a Domino's delivery person. The message was clear: "We are trying to treat you as special and unique."

- **Be sure your advice is being sought.** You must learn to hold back the urge to tell a client, "I know how to solve your problem; you need to _____." While you

(continued on page 4)

The Three Core Skills of Trusted Advisors

(continued from page 3)

may be right, your advice will probably not be accepted. Clients don't always want advice; often, they simply want a sympathetic ear.

● **Earn the right to offer advice.** In a romance, there are rules of sequence; certain stages of the relationship are not appropriate until other stages have been met and passed. The same is true in business relationships. You must earn the right to offer advice to the client by first understanding the client's situation, then understanding how the client feels about it, then convincing the client that you understand both.

● **Say what you mean.** The most common form of communication breakdown (and a major source of lost trust) is misunderstanding about what has been said. Never assume the client is a mind reader. Say what you want and think. Don't hint around. ■

What Is Trust?

Before we learn to increase the level of trust in our client relationships, it is useful to note the characteristics of trust:

● **Trust grows.** Trust rarely develops instantly, except in the face of powerful experience. Upon meeting someone for the first time, we are more likely to recognize that we like or respect the person, rather than trust them. Trust does not happen without work, volition or effort; it emerges from accumulated experiences over time. There is no quick fix where trust is concerned.

● **Trust is both rational and emotional.** In client relationships, trust is, on the one hand, based on a client's direct experience of the expertise brought to bear on that client's problems — a rational approach to the relationship. On the other hand, it is also based on the value placed on advisors for their support, dedication to the client's interests, and courage in constructively challenging the client — all emotional factors.

● **Trust is a two-way relationship.** Trust is a two-way street; you cannot create a trusted-advisor relationship on your own. Clients must participate and reciprocate, and they must do so of their own will — you can't force trust. Building a trusted advisor relationship involves not only straightforward discussions, rigorous decision making and conventional consultation, but also a number of other less structured moments of inspiration and epiphany.

● **Trust entails risk.** The potential of trust violation is always present in a trusting relationship; the advisor's choice not to violate that trust is what makes the relationship special. Creating trust entails taking some per-

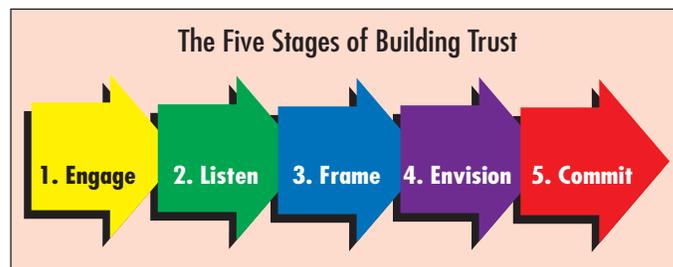
sonal risks — this is the essence of trust. If you're not a little scared on occasion, you're not taking risks. If you're not taking risks, you're not likely to create risks.

● **Trust is different for the client and the advisor.** Just because you can trust doesn't mean you can be trusted. However, if you are incapable of trusting, you probably can't be trusted. The ability to trust someone else is a necessary, though not a sufficient, condition for being trustworthy.

● **Trust is personal.** Although some companies try to attract customers by telling them, "You can trust us," there's no such thing as institutional trust. We don't trust institutions. We don't trust processes. We trust people. Trust requires being understood and having some capacity to act upon that understanding. Organizations are incapable of doing either; only their people can do so. Brand name recognition and reputation can get an institution on anyone's short list, but only a person can keep it there. ■

The Development of Trust in Five Stages

It is important to understand how trust-based relationships are developed; indeed, when examined closely, you can see five essential stages that lead, consistently, to trusting relationships.



Stage 1: Engage

While some believe that the trust-building process begins with listening, something must come first: an initial connection between the advisor and client that sets the stage for the client to want to discuss his or her need. This connection requires an investment on the part of the client — an investment in time and energy to take a risk on the would-be advisor (something the client would not do unless they see some likelihood of good results in return).

Engagement is the stage in which it first occurs to clients (new or current) that perhaps you might be able to help them find a solution to a specific problem. Specificity is important. Not even your current clients will respond to you just because you listen; they must believe that you have something to offer them on a spe-

(continued on page 5)

The Development of Trust in Five Stages

(continued from page 4)

cific issue in order to open up to you about it.

Stage 2: Listen

Effective trusted advisors are very good listeners. Indeed, listening is essential to “earn the right” to comment on and be involved with the client’s issues. We must listen effectively and be perceived to be listening effectively before we can proceed with any advisory process. Advisors make two common mistakes when listening to earn the right:

- **Overly rational listening.** Listening to “earn the right” is very much an emotional as well as a rational process. When you take the time to listen to the client, then absorb what you hear and use it to build the relationship, you display a level of caring that is essential to being a trusted advisor. Listening is not a “soft” skill; at the end of the day, you want the client to be able to look you in the eye and know that you won’t let things go by that aren’t in his or her right interest.

- **Overly passive listening.** Good listening is an active undertaking, a continual back-and-forth acknowledging that each person in a conversation is being heard and understood. The kind of acknowledgment could be a verbal cue (an “Mm-hmm,” or “I see,” etc.) or body language, depending on the content of the message.

Stage 3: Frame

Framing is the act of crystallizing and encapsulating the client’s complex issues and emotions into a problem definition that, in an objective manner, provides both insight and a fresh way of thinking about the problem. It is usually the most challenging of the five steps, although often the most rewarding. Framing involves identifying and enunciating the essence of the issues at hand — usually something that is hidden, critical and/or fundamental.

There are two kinds of framing: rational and emotional. Rational framing consists of distilling a complex set of issues down to a few critical variables. It can be done in such deceptively simple ways as generating a list, drawing a diagram or sketching out a process or approach. It is a critical component of effective advising, but it is hardly sufficient. Emotional framing enables advisors to raise emotional or political issues related to a client problem in such a way that the issues can be addressed without doing harm to the process of solving the problem (which they would eventually do, if ignored). Emotional framing is first and foremost about the courage to take personal risk and surface hidden emotions — a difficult task that is made easier when you remember that it is the client’s emotions that must

What Good Listeners Do

What do good listeners do that makes them good listeners?

- ✓ They probe for clarification.
- ✓ They listen for a story, and for unvoiced emotions.
- ✓ They empathize.
- ✓ They summarize well.
- ✓ They get rid of distractions while listening.
- ✓ They keep the client talking by asking for more details that help them understand.
- ✓ They look (not stare) at the client as the client speaks.
- ✓ They encourage by nodding their head or giving a slight smile.
- ✓ They ask how they might be of help.
- ✓ They are aware of and control their body movement (they don’t move around, shake their legs, fidget with objects, etc.)

What Good Listeners Don’t Do

On the other hand, good listeners don’t:

- ✓ Interrupt.
- ✓ Respond too soon.
- ✓ Editorialize in midstream.
- ✓ Jump to conclusions.
- ✓ Judge the speaker.
- ✓ Try to solve the problem too quickly.
- ✓ Take calls or interruptions in the course of a meeting.

be framed, and not your own.

One useful technique for emotional framing is called “naming and claiming,” which is characterized by three factors: 1) an acknowledgment of the difficulty of raising an issue; 2) an acceptance of the responsibility for raising it; and 3) a direct statement of the issue itself. This technique addresses the embarrassment that stems from speaking what hitherto may have been “unspeakable,” or too uncomfortable to be stated. Using emotional framing is the equivalent of dynamiting a stream that has become clogged to the point of dysfunction.

Most initial attempts at framing, especially those made by clients, are often laden with blame: “I can’t get so-and-so to listen to me,” or, “We need better training.” Blame gets in the way of effectively framing an issue, and of effective advising in general. You must systematically tell the truth and eliminate blame, in order to

(continued on page 6)

Emotional Framing

Being willing to move from blame to responsibility is a risky endeavor. “Naming and claiming” allows responsibility to be accepted in a manner that actually reduces personal risk. It makes judicious use of responsibility-taking caveats such as the following to negate the risks involved in claiming an issue:

- ✓ “It’s probably just me, but ...”
- ✓ “I’m sure you’ve covered this before, but ...”
- ✓ “You’ve probably thought of this already, but ...”
- ✓ “I’m not sure if this is on point, but ...”

Having posed enough responsibility-taking caveats, say the thing that needs to be said. Only by emotionally framing difficult issues can you realize the enormous payoffs that come from handling problems openly and moving forward.

The Development of Trust in Five Stages

(continued from page 5)

maneuver toward full ownership of a blame-free problem statement that can be acted upon, evaluated and transcended.

Stage 4: Envision

Contrary to what many might think, once a problem is defined, the next step is not to solve it. A problem can have many solutions, depending on what clients want to achieve, or for which state they want to aim. Together, you must jointly envision (in as rich a detail as possible) how the end result might look without prematurely giving in to the temptation to solve the problem.

Envisioning entails addressing at least three questions:

- **What are we really aiming for here?**
- **What will it look like when we get there?**
- **How will we know we are there?**

When done successfully, envisioning is usually the point in the process where clients begin to understand their own true goals, defining those goals in such a way that they can realistically be committed to achieving them. Successful envisioning takes people out of the technical, problem-solving, high-risk perspective with which they approach most problem-solving and into a new perspective, one that encourages freedom and creativity, creating great value in the process.

For example, United Research (a consulting firm that later became part of Gemini Consulting) used envisioning to great effect in the 1980s and early 1990s. As part of its sales process, the organization asked large numbers of people in client organizations a series of leading questions:

- **Could things be different around here?**
- **If so, could they be better? How?**
- **What would things look like in this better future?**
- **What would have to change for that to happen?**
- **Where would the benefits show up?**

As people spent time on this envisioning step, they articulated in great detail how things might look in a world where the major problems facing them had been solved, or a major opportunity attained. In doing so, they took an abstract concept of a “better world” and created a concrete vision of their ideal situation, enabling them to work toward making it a reality.

In a two-person, trust-based conversation, you can jointly focus on a mutually attractive future, unencumbered by the problems of the present, enabling you to break down barriers and build bridges to that ideal future. It should, however, be recognized that even acknowledged problems cannot always be solved, as a matter of the client’s choice. The client may determine that the benefits of the future state are not worth the effort, or that the problem is one he or she can live with.

Stage 5: Commit

The dictionary gives two meanings of the word commitment: 1) an agreement or pledge to do something in the future; and 2) the state or instance of being obligated or emotionally impelled. The first definition is about action; the second is about an emotional state. It is the second definition that keeps us in the realm of the personal and emotional, which is what commitment should mean in the context of trust.

If you follow the trust-building process, by the time you get to Stage 5, the problem has been framed to everyone’s satisfaction, and the vision you wish to attain is clear. What must follow is a series of conversations that will determine:

- **what stands in the way of achieving the solution,**
- **what the involved parties are willing to do about it,**
- **who must be brought into the loop,**
- **what roles each person must play,**
- **what information you need,**
- **when and how to check in on progress,**
- **what key deadlines loom ahead.**

The client must understand the details of implementation, what difficulties loom ahead and what new behaviors might be required to address those difficulties. Trust, in this case, is enhanced by the advisor’s openness and candor, sharing his or her experiences in an effort with which the client may be unfamiliar. It can be

(continued on page 7)

The Development of Trust in Five Stages

(continued from page 6)

tempting, for example, to leave out discussions of risk at the beginning of an assignment. These conversations are essential, though; to leave out an explanation of the pitfalls of an endeavor might be viewed by the client as arrogance or secrecy.

A central part of building commitment to action is carefully managing the client's expectations about what is and is not going to happen to solve the problem. To manage expectations well, you must do the following:

- **Clearly articulate what you will and will not do.**
- **Clearly articulate what the client will and will not do.**
- **Define the boundaries of the analyses you will perform.**
- **Check with the client about areas in which or people with whom the client does not want you to be involved.**
- **Identify precise working arrangements.**
- **Agree on methods and frequency of communicating.**
- **Decide who should get which reports, how often those reports will be delivered and how they will be used.**
- **Decide what milestones and progress reviews are needed.**
- **Decide how success will be measured, both during and at the end of the process.**

Commitment in the context of the trust process is both joint and personal. The advisor must forge a two-sided, truly joint commitment, not one that arises simply from a shared workload calculation. To do this, the advisor must propose solutions that deepen the linkages on both the rational (or content) side and the emotional (or personal) side, strengthening the relationship between the two parties. ■

What's So Hard About All This?

There are many reasons people find it difficult to fulfill the trusted advisor role, among them:

“It's all too personally risky.” That's right. It is risky, and if you don't do it with careful balance, it will also come off as flaky and embarrassing. Careful balance is key — as are awareness, focus and practice. The fact that it doesn't get done often is an opportunity, not a problem. It's a chance to distinguish ourselves. Risk is the essence of creating intimacy.

“Content is all.” The fact that professional services firms often breed a culture of content expertise and mastery means very little if the client doesn't trust you. Truly great professional service firms haven't just made an adjustment to a trust-based approach; they are (or will be) built on it.

“The process sounds so s-l-o-w! My budget won't allow for this!” This makes two false assumptions. First, it assumes that clients won't pay for counseling time. In truth, clients more readily perceive the value of counseling because it is done with them, in their presence. Secondly, this concern assumes that time spent advising a client must be recouped on the current assignment. In truth, effective counseling can be among the best means of generating future revenues. ■

The Lieutenant Columbo Approach

Sometimes a metaphor concisely captures and conveys meaning better than words. Such is the case with Lieutenant Columbo, the television homicide detective played by Peter Falk for three decades. The Columbo character embodies a number of characteristics that can be useful for successful advisors.

Although his rumpled appearance and aloof manner

(continued on page 8)

What Skills Are Required to Build Trust?

The five stages of trust building require different skills that the trustee must accomplish:

- ✓ **Engaging requires the skill of being credibly noticed.**
- ✓ **Listening requires the ability to understand another human being.**
- ✓ **Framing requires creative insight and emotional courage.**
- ✓ **Envisioning requires a spirit of collaboration and creativity.**
- ✓ **Commitment requires the ability to generate enthusiasm and manage over-enthusiasm.**

Individuals you encounter might have divergent opinions as to which stage is the most important, but there is no “key” to the process, no “magic button” that stands above the others — each stage is essential to the trust-development process. The point in the process at which a client might articulate a key moment depends largely on the issue at hand and on the approach of the advisor.

The Lieutenant Columbo Approach

(continued from page 7)

hardly seem imposing, Columbo actually has an instinctive knack for drawing out the criminal and confirming his (correct) suspicions. He disdains official police methodology, preferring to go for customized, on-off situational engagement, allowing the criminal to let down his guard. Columbo uses his style to eradicate a preconception, thereby setting the other party at ease; this is his genius, and it is what an advisor must emulate.

Often, client interactions boil down to, “you expert, me dummy” exchanges, sending out deep, layered psychological echoes that may include resentment, awe, jealousy, competition and so on. Because there are things at stake, the client may also have a sense of criticality, of impending something. Advisors may also have on display visual trappings of their expertise — a framed degree, a new technological toy, etc. — that causes unease on the part of the client.

Columbo neatly punctures these trappings, praising the “client’s” intelligence, dismissing the seriousness of his capabilities, and thereby lowering the “client’s” inhibitions. The “client” is then willing to talk openly and honestly, describing things as he perceives them and not as he wants others to perceive them. Information is offered; personalities emerge; progress toward resolution can be made.

Columbo’s genius lies in neutralizing expectations about himself, stripping away illusion and pretension, subordinating his ego at the service of the “client.” And, of course, he always wins. ■

The Quick-Impact List to Gain Trust

What are the things you can do to gain trust that have the highest impact, or fastest payback?

1. Listen to everything. Force yourself to listen and paraphrase, in order to get what the client is trying to say.

2. Empathize (for real). Anyone who understands us has earned the right to engage in discussion, even debate; anyone who empathizes with us has earned the right to disagree and still have our respect. Listen to where the client is coming from, understand that perspective and acknowledge that understanding.

3. Note what the client is feeling. Note what clients say and do in your interactions with them. Make careful deductions about what their feelings might be. Acknowledge your own feelings and voice them as well, but carefully.

4. Build a shared agenda. Whether you’re in a large or informal meeting, share your ideas for an agenda and ask the client to add their ideas as well. This creates buy-

in and shows you have a “we, not me” attitude.

5. Take a point of view. Go out on a limb with an idea or perspective, even if you’re not entirely sure of it. Such articulation stimulates reactions and crystallizes issues, serving as a catalyst to draw ideas out of your client.

6. Take a personal risk. Put yourself “out there” for your client — reveal something about yourself, even though such revelations carry with them risks of personal loss, even ridicule.

7. Ask about a related area. Advisors who notice and express interests outside their particular realm of experience make an impression on their clients. They show that they care enough about the client to not merely focus on the narrow realm of their professional issues and interests, but to expand that focus to address a wide array of client needs.

8. Ask great questions. Open-ended questions allow you to probe for client needs without artificially framing the client’s response or biasing them one way or another. The objective is to hear what the speaker has to say, in the speaker’s own terms. By doing this, you show the speaker respect by allowing him or her to set the frames of reference, not contorting them to fit your viewpoint.

9. Give away ideas. Expertise is like love — not only is it unlimited, but you can destroy it by not giving it away. It cannot be scanned into a database; rather, it is the uniquely human ability to redefine a problem and come up with creative solutions for solving it. It is what a successful advisor brings to every situation, and it only gets better with practice.

10. Return calls with unbelievable speed. Getting back to the client, fast, could be the most trust-creating thing you do. No one expects it, and it demonstrates how much you value your client.

11. Relax your mind. Critical meetings with your client can be stress-inducing environments; it is crucial to rid your mind, however temporarily, of internal distractions prior to entering into such situations. One way to do this is to concentrate on a piece of wisdom or key question, such as the following:

- **It’s about the client.**
- **Who am I thinking about?**
- **The problem is rarely what the client said it was at first.**
- **Who am I serving by my present approach?**
- **What am I afraid of here?**

Think about one saying or question at a time. Write out your feelings about the one you choose, or talk through it, aloud, prior to a client meeting. Doing so will help cleanse your mind of distractions or internal conflicts prior to heading into a potentially stressful situation. ■