TOP 10 WEEKLY TIPS 2015

THE GET REAL PROJECT

Hello!

Thank you for taking a closer look at The Get Real Project's ten most popular Weekly Tips for 2015.

Described by subscribers as "insightful, practical and entertaining" and "one of the few non-client emails I open and ready every week," our Weekly Tips have one simple goal: to keep the conversation alive about what it takes to get real—and get real results—in your client relationships.

This year's favorites explore relationship development as well as business development. Many are lighthearted and a few are sobering. There's a definite (albeit unintentional) food theme. They all include suggestions for how to walk the talk. And, though it's corny to say, each one was written with love.

Enjoy ...

Andrea

Andrea Howe
Founder of The Get Real Project and
co-author of *The Trusted Advisor Fieldbook*

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THE GET REAL PROJECT

WEEKLY TIP 1

Your #1 predictor of personal success in the new year

I'm writing this message from the lobby of a schwanky hotel in Washington DC (my home town), where my colleague Nicolette and I have dedicated a day to writing stuff that supports our respective businesses: weekly tips and blogs for me, and a book for her. This is the result of a pact we made late last year to help each other take time out to do what would otherwise fall by the wayside.

We chose the hotel setting thanks to inspiration from my friends at Valuable Content, who advise that writing great content is most likely when we step away from our usual surroundings, and also go somewhere we'll look forward to.

As I was getting ready to meet Nicolette this morning, it occurred to me that just about every time I've made a significant and important change in my life—when I've actually followed through on a commitment to do more of what really matters to me—I've done it with the help of a buddy.

Which is why I suggest that you having a buddy (or an entourage) is your #1 predictor of personal success in the new year. I believe this is true for whatever you want to accomplish—business or personal, general or trust-related.

My assertion is not supported by a lot of research (at least not any that I have at my fingertips) and maybe "#1" is a reach, I dunno. Based on my own personal experience, it's spot on.

I also know, from nine years of leading programs on trusted advisorship, trust-based selling, and trust-based consulting, that when it comes to business relationship excellence, making changes in your every-day practices is essential. We all need a certain amount of toughness, perseverance, and support to walk the talk of trusted advisorship. Toward that end, a buddy (or two or three) is an invaluable resource—whether they simply provide a listening for the declarations you make out loud, or play a more active role by checking in with you on your progress or providing feedback on their direct experience of you.

Who's got your back in the new year?

Make It Real

This week, choose one aspect of your business relationships (or life in general) where you want to make a change. Then consider your best buddy candidates, and reach out to one or more with a request for help. Keep it simple, be clear about your expectations, and be sure to choose someone (or people) you'll look forward to interacting with.

Learn More

Put a little structure behind your buddy relationship with a 30-day experiment, or find out why self-knowledge is power in Chapter 10 of *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust.*

#TopTip2015 Your #1 predictor of success in the new year #accountability

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WEEKLY TIP 2

Why your very good advice doesn't get taken

I just looked back at the 33 weekly tips that we've shared over the past six months only to realize I've written shockingly little about the dynamics of influence. Time to fix that!

In my workshops on trusted advisorship and trust-based selling, I often ask participants to indicate, by a show of hands, who has ever had the experience of giving good advice only to have it not be taken. Invariably, nearly all the hands in the room go up.

Looking at your own experience, this may even happen to you on a regular basis—especially if you have teenagers at home.

The question is, why does this happen? You're very confident about your advice; you know the right thing to do on a given issue. Let's even say that you are, in fact, right. You advise your client or colleague or direct report (or kid) to do the right thing, and … with apparent disregard for all things logical, he chooses another option.

That's because trust and influence go hand in hand. The more someone trusts you, the more likely he is to be influenced by you. The less someone trusts you, the less likely he is to be influenced by you. So hands go up more often than not for one simple reason: trust is missing or compromised. And the onus is on you—not them—to do something about that.

In the business of advice-giving, it is not enough to be right—you have to earn the right to be right.

Make It Real

This week, learn from your 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. What makes this person so effective? What does she think, say, or do? Then, look inward. 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?

Learn More

Find out why being right is vastly over-rated, from our friends at Trusted Advisor Associates, or learn more about the dynamics of influence in Chapter 3 of *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust.*

#TopTip2015 There's a reason people aren't listening to your advice. It's an unexpected one.

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WEEKLY TIP 3

What baked goods can teach us about client relationships

Five years ago I was surprised by a knock at the door—an unexpected delivery of baked goods from a local sweet shop. The package included a handwritten note from Kacy, the office organizer I had hired exactly one year before. The sweets were to commemorate my first anniversary in my new home office, with a reminder that she was available should any lingering piles be in my way, and a no-obligation request to tell others about her services if I was so inclined.

I immediately logged onto Facebook (well, by "immediately" I mean right after I ate a cookie) and posted kudos for Kacy, along with a link to her web site. (And I've referred her many times since. For years.)

While this might seem like a great marketing story, don't be fooled; Kacy's actions are as much about deepening client relationships as they are about marketing. And anyone in any role can learn and benefit from her best practices.

In the parlance of the trust equation, Kacy's gesture was a clear demonstration of high intimacy and low self-orientation, with a little dash of credibility in the mix as well:

- Kacy acknowledged me, in a very personal way
- She let me know she cared about me—enough to keep track of, and commemorate, the anniversary of our work together
- Kacy was generous, without expectation of return (which, by the way, is why I felt inspired, not obligated, to refer her)
- She had the confidence to ask for more work.

Plus there's one other great lesson here: Being in touch with clients takes focus and effort, not time. One touch-point in a twelve month period might be plenty, if it's the right touch point.

Make It Real

This week, think about clients with whom you'd like to stay in touch. Make a list. What meaningful milestones might you track and acknowledge? What gesture might you make that's distinctive, genuine, and simple?

Learn More

Read more about the Kacy story, or learn about developing new business with existing clients in Chapter 17 of *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust.*

#TopTip2015 What baked goods can teach us about client relationships.

[click to tweet]

WEEKLY TIP 4

How an auto-reply can make a lasting impression (or not)

I'm once again beating the "trust is personal" drum. There are hundreds of ways to personalize your interactions with people. Why not start with how you're in touch when you're out of touch?

A little back story: I'm out of the office a lot. I lead workshops that can consume me for days at a time. As I write this message to you, I'm on a writing retreat (because I've learned that going off-site with a buddy helps me do better work).

You're familiar with the out of office ramifications, of course: The massive email pile-up.

Why not turn obstacle into opportunity?

I started getting creative with my email auto-replies shortly after *The Trusted Advisor Fieldbook* was published and my travel commitments quadrupled. My experiment was borne out of guilt; I didn't want clients getting "I'm out of the office without access to email" again and again. (And I didn't want to NOT have auto-replies, because I believe in being responsive and accessible.)

An easy start: I provided a little information about my location.

> "I'm speaking at the SHRM National Conference in Orlando today..."

Over time, I played with being more creative:

> "I'm in North Carolina, home of the Krispy Kreme doughnut, through Tuesday evening ..."

I've also tried quotes, and humor (and both):

> "Benjamin Franklin said, 'Either write something worth reading or do something worth writing.' Today I'm working on the former, curbing my email addiction so I can focus ..."

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WEEKLY TIP 4

How an auto-reply can make a lasting impression (or not)

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Make no mistake, these still feel risky to put out there for various reasons, and it's been a few years. I'm just more confident about doing them now because I've gotten so many positive reactions. (One client, when interviewed for feedback on our work together, made an unsolicited mention of the auto-replies: "She's present even when she's not present. She's probably the only person I know that you can get an out of office message and still feel like she's talking to you … you never feel like you're disconnected from her.")

Some of my examples may not be right for you. Adapt to suit your style. Just don't play it too safely. Part of the point is to take the risk that others might get to know you a little.

Trust is personal, after all.

Make It Real

This week, draft three different auto-replies that you might use the next time you're out of the office (or in the office and craving a little breathing room to get stuff done). Experiment with different levels of personal risk-taking. Then commit to using one of your drafts.

Learn More

Read more about my auto-reply strategy on Forbes.com, or discover six ways to practice risk-taking in Chapter 9 of *The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust*.

#TopTip2015 What has your auto-reply done for you lately?

[click to tweet]

WEEKLY TIP 5

What your mom can teach you about business development

If you're anything like me, you had a mom who insisted that you send a hand-written thank you note any time you received a gift. Oh how I dreaded sitting down to crank one of those out. It was, simply put, a chore.

Decades later I'm ever-grateful to my mom for having me do something so many times that it's now easy and comfortable. Why? Because a hand-written note is a striking differentiator in today's low-touch, technology-driven world.

A handwritten message is also versatile. It's a great way to:

- Tell an existing client something you appreciate about them
- Share with a new acquaintance something that struck you favorably about your first meeting
- Let a past client know they're on your mind
- Brighten the day for someone in a support role.
- It's all the better if you have to make a little extra effort to track down a good snail mail address; they'll know it really mattered to you that they get your communication.

Here's an added bonus: The brief time it takes to express yourself is time spent present to gratitude rather than everyday stress. I don't know anyone who can't benefit from that.

Make It Real

This week, send three hand-written notes of thanks or appreciation.

Tips: I like to have a stack of assorted stationary on hand in my office. I also tuck a few blank note cards into my travel folder—they're a great way to fill time during takeoff and landing. And if your mom wasn't as fervent as mine, I just found some handy tips for how to structure your note online.

Learn More

Learn more about the difference gratitude makes from our friends at Trusted Advisor Associates, or read a story of how a hand-written note sealed a deal in Chapter 11 of *The Trusted Advisor Fieldbook*.

#TopTip2015 The extra effort of a hand-written note is a striking differentiator in our technology-driven world.

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WEEKLY TIP 6

A perfect example of easy BD

Last week's tip about the power of a hand-written note reminded me of another great example of just how easy business development can be.

Check out the letter I got last year after my first online purchase from a custom framing company called American Frame:

Dear Andrea,

I am writing to personally thank you for your recent order. Welcome to American Frame!

I hope your experience with us was one you would define as 'exceptional ', from the ease of ordering to the timely delivery of our beautiful, high quality materials. As a second generation member of our family business and I want to make sure you are 100% satisfied with us.

As a token of my appreciation, please accept this coupon for an extra 10% off your next order: LJ1410.

It is a single use per customer coupon without an expiration date so it will be there for you when you need it next. Please feel free to share it with friends and colleagues who might benefit from our services. We appreciate referrals and promise to take great care of those you send our way.

Thank you again,

Sincerely,

Laura

Laura Jajko, VP/Owner

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WEEKLY TIP 6 A perfect example of easy BD

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Here are three things I really like about this letter:

1. **It's personal.** Three touches of a blue ink pen—an underline, exclamation point, and signed first name—are all it takes to make a form letter feel friendly. My estimate for Laura's effort: three seconds.
2. **It's generous.** I get a coupon with no expiration date. Not only that, I can both use it and share it with as many people as I'd like. (The code is LJ1410 in case you can't see the graphic. No kick-backs for me, other than the natural high of gift-giving.)
3. **It's ambitious.** Laura, a second generation of a family business, wants my experience to be "exceptional" through and through. She's confident in their "beautiful, high quality materials" and promises to take great care, not just good care, of anyone I send their way. I like that.

Most of us are selling professional services, not framed artwork. Still. There's gotta be a way to translate this approach into our world.

Make It Real

This week, sit down with your team and brainstorm how you might apply the tenets of the American Frame approach—personal, generous, ambitious—to reach out and touch your clients.

Bonus offer: Post your idea as a blog comment. If I get at least 10 suggestions I'll give a custom-framed Get Real manifesto poster to the person/team with the best one.

Learn More

Find out why a small kindness can have big impact or read more about client focus in action in Chapter 11 of *The Trusted Advisor Fieldbook.*

#TopTip2015 Easy BD: Reach out and touch your clients in a way that is personal, generous, ambitious.

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WEEKLY TIP 7

Pizza or cheeseburger?

Hot Dog.

I've been meaning to write about a trust lesson I learned recently on an Amtrak trip. Last week's tragic accident on the Northeast corridor compels me to write it sooner rather than later. Life is short, and it's important to acknowledge people who make a difference in your life.

This week's lesson is about the courage to state a point of view. It involves food.

A few weeks ago, I was traveling from New York City back to Washington D.C. It was late on a weeknight. A mad rush hour dash to the train station meant there was no time to grab dinner before boarding. Famished, I made a bee-line for the Café Car as soon as I claimed a seat. The friendly guy behind the counter asked me what he could get me. I knew I wanted something hot; I just didn't know what. So I answered by soliciting his opinion: "Pizza or cheeseburger?"

To which he immediately and resolutely replied, "Hot dog."

I laughed. He explained that in his experience the hot dog was by far the tastiest menu option. He was upbeat, outgoing, and confident. Then he added, "Cheeseburger would be my second choice."

Still a little reluctant to let go of both of my top two choices, I asked whether cheeseburger was a close or distant second for him. Without hesitation (again) came his affable reply: "Distant."

So hot dog it was. Turns out it was actually a pretty good hot dog, as hot dogs go. He knew his product well. And I enjoyed my meal all the more because of my pleasant and efficient interaction with the SME who sold it to me.

The exchange reminded me of the power and importance of having and asserting a point of view, even when it's not what you think your client wants to hear. This is the "advisor" part of the term "trusted advisor" and it's critically important. You build trust in the process of sharing your knowledge and opinions when you do so with a blend of confidence, courage, directness, humility, good humor, and great timing.

To my Café Car buddy, I say this: Thank you for a nice meal at the end of a long day. More than that, thank you for being a great role model. I hope you weren't on train 188 last week. And if you were, I sure hope you're doing OK. This week, in your honor, I vow to be more like you with my clients.

Make It Real

This week, reflect on your role models when it comes to leading with trust. Look for them in unexpected places. What lessons do they teach you? How might you honor them this week?

Learn More

Read about eight ways to make people believe what you tell them, from our friends at Trusted Advisor Associates, or brush up on all four variables of the trust equation in Chapter 4 of *The Trusted Advisor Fieldbook.*

#TopTip2015 While it may not be what the client wants to hear, it's the "advisor" part of being a #trusted advisor.

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WEEKLY TIP 8

What NOT to say to a grieving client

Facebook COO Sheryl Sandberg recently marked the end of her first 30 days of mourning for her late husband. Dave Goldberg died unexpectedly while they were vacationing in Mexico. On the last day of sheloshim, which marks the completion of religious mourning for a spouse, she shared a compelling and beautifully-written post on … well, Facebook, of course.

Among other things, Sheryl's essay includes extraordinary lessons for anyone struggling to find the best or right way to acknowledge another person's grief.

If you haven't known a client who has experienced a profound loss during the course of your relationship, it's only a matter of time. When it happens, here are three simple Do's and Don'ts that I culled from Sheryl's thoughtful and heartfelt writing:

DON'T: Say nothing.

DO: Be honest if you don't know what to say, as in, "I'm at a total loss for what to say." Acknowledge the elephant in the room.

DON'T: Ask, "How are you?" (How do you think they are?)

DO: Ask, "How are you today?" It shows you realize the best they can do is get through each day.

DON'T: Assume hope is the most comforting thing you can offer and assure them everything will be OK, as in, "You and your children will find happiness again."

DO: Speak the truth. Be willing to acknowledge that things are not OK, as in, "You will find a new normal, but it will never be as good."

Wise advice shared by someone during an excruciating period of grieving. I, for one, will be sure Sheryl's lessons don't get lost.

Make It Real

This week, consider the people you've been avoiding because something awkward or uncomfortable has been in the way. Reach out. Life is short.

Learn More

Read Sheryl's full post.

#TopTip2015 Advice on an appropriate way to acknowledge a client's grief.

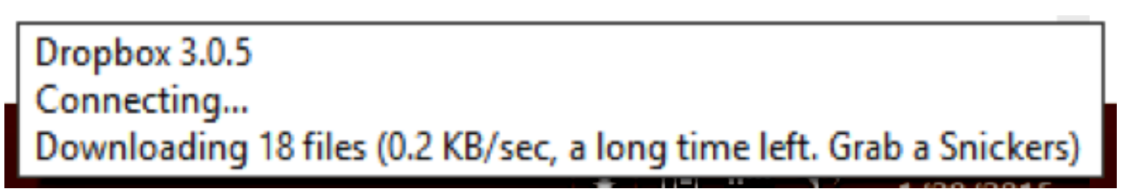
[click to tweet]

WEEKLY TIP 9

Want a better relationship? Grab a snickers.

If you're anything like me, you're guilty of taking business—and life—a little too seriously every once-in-a-while. (Actually, if you're like me, you take things too seriously a lot.)

Not long ago I got a status message from Dropbox that reminded me to walk on the lighter side of life:



I like this message because it's unexpectedly light-hearted, casual, and funny. It's also honest. It's something a friend would say to another friend. More than a system tray message, it's a great reminder to relax a little, and to communicate with people in a convivial, approachable, and direct way.

I know just about all my relationships—especially the ones marked by challenging circumstances—would benefit from a little levity. How about yours?

Make It Real

This week, look for opportunities to bring some merriment to your interactions. (Yes, I did indeed say "merriment.") How might you be a little friendlier? A little more approachable?

Learn More

Read more about consulting and the art of self-deprecation, or find out how humor might advance your trusted advisor goals in Chapter 8 of *The Trusted Advisor Fieldbook.*

#TopTip2015 Relax and remember to #communicate with people in a convivial, approachable, and direct way.

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WEEKLY TIP 10

BFF or buttoned-up professional?

Last week's tip about the friendly computer-generated message got me thinking more about the role that friendship skills play in business, and particularly in sales.

Most of us have a natural tendency to want to keep our professional relationships and our friendships separate, often working hard to keep a solid boundary between the two.

That's a bad idea if you're in professional services.

In 2005, David Maister, one of the original authors of *The Trusted Advisor*, published an article advocating for the blurring of those very boundaries. Maister asserted a direct connection between your ability to make friends and your ability to cultivate business:

> "The way most clients choose among professionals is essentially identical to the way people choose their friends," he wrote.

More specifically, Maister suggested that when it comes to deciding which professionals to work with, clients will choose you if you can do four things:

1. **Put them at ease**
2. **Make it comfortable for them to share fears and concerns**
3. **Be trusted to look after them, not just their transaction**
4. **Prove you are dependably on their side.**

None of which transpires from the buttoned-up business persona that many of us are tempted to assume in the name of "professionalism."

To be clear, there is a distinction between seeking BFFs and bringing your friendship skills to bear. The latter is essential; the former a nice byproduct.

Maister asserts there are people in this world who have a talent for friendship. Are you one of them? If you're not, are you willing to work on that?

Make It Real

This week, develop your talent for friendship. Seek out conversations with three people with whom you know (or suspect) you have little in common. Make it your mission to find an overlap; any overlap. As Maister says, "Someone can be your friend if you have anything in common. You don't need a majority of things in common."

Learn More

Read more about the differences between buyer screening and selection, from our friends at Trusted Advisor Associates, or refresh on the power of listening (and how to do it well) in Chapter 6 of *The Trusted Advisor Fieldbook*.

#TopTip2015 The buttoned-up #business persona is NOT going to attract clients; being a #trusted friend will.

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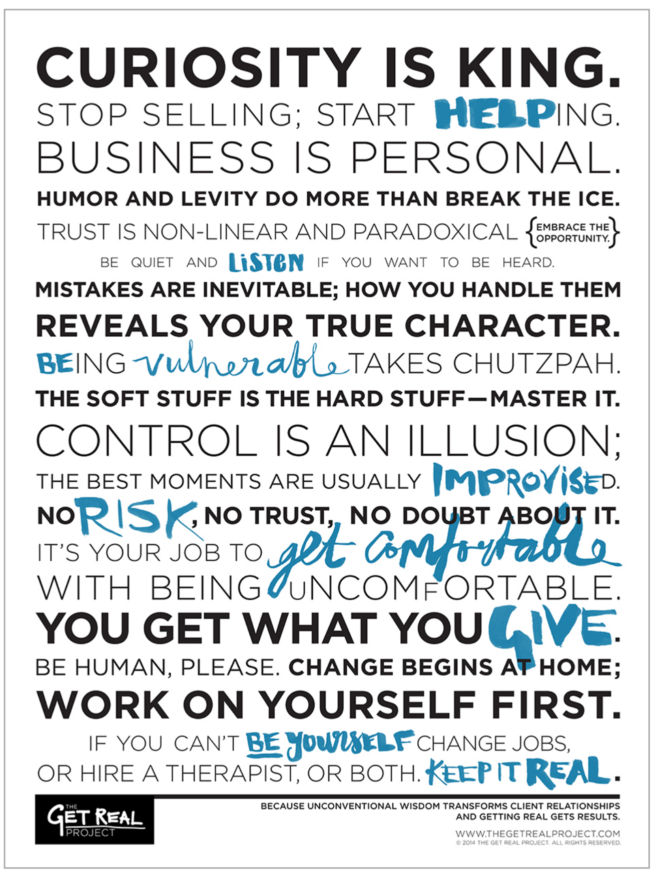

ABOUT THE GET REAL PROJECT

The Get Real Project is a collection of people and resources dedicated to kicking conventional business wisdom to the curb and transforming how people work together as a result.

Our team provides a suite of products and services that help professionals in consultative roles master the "soft stuff," like our signature programs on *Being a Trusted Advisor*, *Trust-Based Selling*, and *Improv-ing Relationships*.

Getting Real Just Got Easier

Want to take your client relationship skills to a whole new level of mastery? Get our Weekly Tips delivered to your (virtual) doorstep if you don't already. Download the Get Real Manifesto. Or access hundreds of articles and eBooks.