

How to Deliver Bad News and Build Trust at the Same Time

Key Takeaways

A **WORK SITUATION** that requires me to deliver bad news

1. What I need to say:
2. To whom:
3. Why I haven't said it yet:
4. What caveats I might use:

FREE DOWNLOADS:

- 82 Ways to Build Client Trust (handout)
- Six Risks You Should Take to Build Trust (eBook)
- *The Trusted Advisor Fieldbook* on fundamental truths of trust-building (book excerpt)
- *The Trusted Advisor Fieldbook* Worksheet Series (book excerpt)

Four variables of **TRUSTWORTHINESS** are:

C
R
I
(Low) S

← **Circle** the one that you tend to lean on.

Star the one that you tend to leave behind.

NAME IT AND CLAIM IT has three steps:

1. Clarify
2. Inventory top-of-mind
3. Use caveats to

A **CAVEAT** is a short phrase that serves as

To tell or not to tell? The **THREE-QUESTION TRANSPARENCY TEST**:

1. Am I hesitant for _____ reasons?
2. If s/he finds out later, will s/he feel _____?
3. Would I say something if s/he were _____?

My **BIGGEST TAKEAWAY** from today is: