

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:

Credibility

Reliability

Intimacy

(Low) Self-orientation

← **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 **the issue** (Tip: 10 words or fewer)
2. Inventory top-of-mind **worries/fears/concerns** (yours)
3. Use caveats to **say them out loud**.

A **CAVEAT** is a short phrase that serves as a **warning or cautionary detail**.

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

1. Am I hesitant for **Big "S"** reasons?
2. If s/he finds out later, will s/he feel **misled**?
3. Would I say something if s/he were **my friend**?

My **BIGGEST TAKEAWAY** from today is: