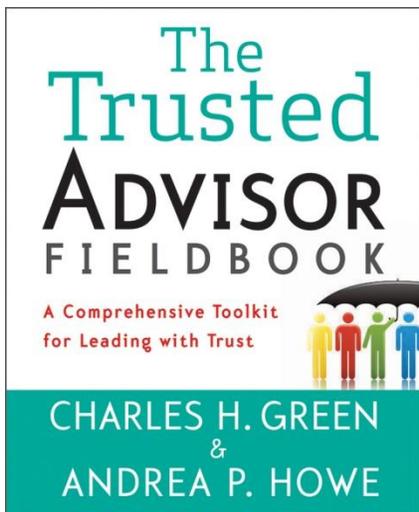


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# The Trusted Advisor Fieldbook Worksheet Series

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**You can't lead without trust.**



[The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust](#) provides answers to pervasive questions about trust and leadership, such as how to develop business with trust, nurture trust-based relationships, build and run a trustworthy organization, and develop your trust skill set. Put the knowledge and practices in the fieldbook to work, and you will become someone who earns trust quickly, consistently, and sustainably—in business and in life.

**Each chapter offers specific ways to train your thinking and change your habits** in order to earn the trust that is necessary to be influential, successful, and known as someone who makes a difference. *The Trusted Advisor Fieldbook Worksheet Series* is a collection of all the self-administered worksheets and coaching questions included in the book.

**Use this document alongside the book, or as a standalone resource.** Complete the worksheets thoughtfully and gain immediate insights into your current business challenges.

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# I: A Trust Primer

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## Chapter 1: Fundamental Truths

Building trust can be a surprisingly simple thing—yet it is anything but easy. Trust is a complex concept in human relationships. It is often misunderstood, even though it is something practiced somewhat unconsciously all the time. We intend this book to do double duty: to give you practical, commonsense advice, while at the same time allowing you to think critically and speak fluently about trust.

In *Chapter 1: Fundamental Truths* we take aim at the complexities of trust, breaking it down so that it can be managed and more readily increased. We take a critical look at the paradoxes, dynamics, and language of trust. We explore maxims, such as “Trust is personal,” “Trust takes time,” and “There is no trust without risk.” We also describe the relationship between trust and influence and reveal the key that unlocks the mystery to being influential.

### Worksheet: Your Truths about Trust

What’s true for *you* about trust?

What trust maxims do you live by?

Which maxims serve you well? In what ways?

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Which maxims are limiting? In what ways?



## Chapter 2: Fundamental Attitudes

*Chapter 2: Fundamental Attitudes* explores five attitudes that provide the foundation for building trust. These attitudes arise from the fundamental truths about trust explored in Chapter 1, and in turn inform the specific trust skills we will explore in Chapter 5. Understanding and adopting these attitudes will increase your success in your efforts to build trust and lead with trust.

### Worksheet: Attitude Is Everything

For each fundamental attitude, reflect on how this attitude is present (or not) in your day-to-day interactions with others. Jot down examples of how your actions align with each attitude, and examples of how they do not align.

Fundamental Attitude	How Your Actions Align	How Your Actions Do Not Align
<b>Principles over processes.</b> Trust-based relationships cry out for principles. A role that can be completed largely or wholly from processes alone is not a role that requires much trust.		
<b>You are more connected than you think.</b> Redefine your notion of relationship to include <i>everyone</i> . Why? Because leading with trust requires an expansive view of relationships.		
<b>It's not about you.</b> Both being trusted and having your advice accepted require that you recognize that not everything you hear, everything that is said, everything that happens, is about you.		

Fundamental Attitude	How Your Actions Align	How Your Actions Do Not Align
<p><b>Curiosity trumps knowing.</b> A state of curiosity builds relationships. It is intrinsically other-focused—its purpose is discovery. By contrast, being in a state of already knowing leads to narrow focus, disconnection, and worst of all, arrogance.</p>		
<p><b>Time works for you.</b> Time-based thinking goes awry when instead of using it to <i>measure</i> reality, you use it to <i>control</i> reality. Treat time as another aspect of a shared journey with your customers, colleagues, and other partners.</p>		

What do you notice as a result of answering these questions?

## Chapter 3: The Dynamics of Influence

The “advisor” aspect of “trusted advisor” serves a critical business function: fulfilling the promise of providing expertise in a way that makes a difference. Effective advice-giving is part art, part science, and mostly nonrational. How we listen to others matters much more than what we say. This paradoxically has the result of making others more likely to listen to us. The act of listening itself creates relationship and trust. *Chapter 3: The Dynamics of Influence* explores three steps to being more influential. It also offers a five-point checklist for influencing meetings.

### Worksheet: Learning from 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.

My model influencer:

What makes this person so effective? What does she think, say, or do?

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?

## Worksheet: Putting the Dynamics of Influence to Work

Bring to mind an upcoming opportunity to be influential with one or more people. Describe it briefly, and then use the questions below to prepare for your interaction.

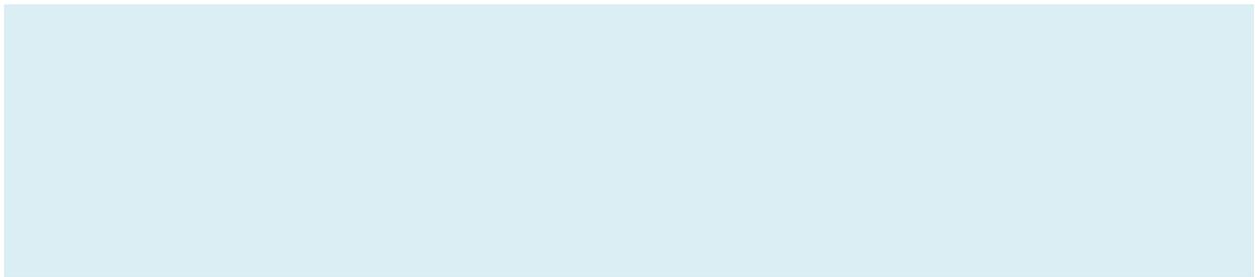
Opportunity:



What will help you detach from the outcome and remind yourself that the ultimate objective is to improve your partner's situation, as well as the relationship between you?



What point of view are you bringing to the interaction? State it crisply and simply.



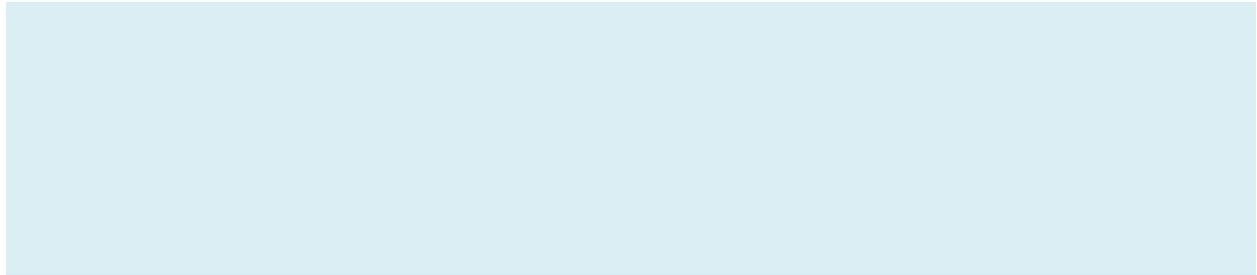
What are you curious about? What questions might you ask to thoroughly understand and appreciate the perspectives of the other(s) with whom you will be in conversation?



In what ways can and will you be open to be influenced in the process? What might you learn? What could you discover that might alter your feelings or your point of view?

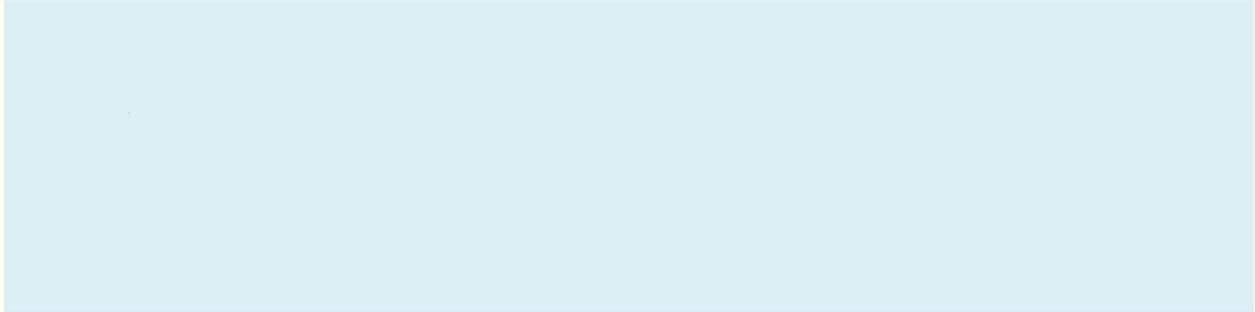


As a result of this preparation, how will you approach this opportunity differently from the way you have in the past?

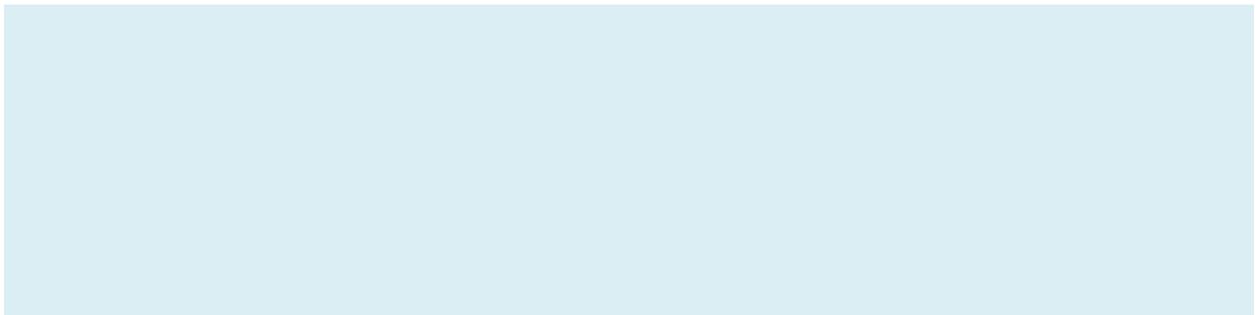




For each variable where your score is relatively high (4 or 5 for credibility, reliability and intimacy or 1 or 2 for self-orientation), what contributes to your success?



For each variable where your score is relatively low (1 or 2 for Credibility, Reliability and Intimacy or 4 or 5 for Self-Orientation), in what ways might you close the gaps?



Tip: Share your assessment with your stakeholder and get her feedback.

## Worksheet: ELFEC in Action

Reflecting on and studying the conversations you are having is a great way to increase your awareness about trust. Begin by thinking of a recent conversation with a key stakeholder.

My stakeholder:

**Engage.** How did you begin the conversation?

Did you offer something of value?

Y  N

Did you set a tone of openness for the conversation?

Y  N

In hindsight, what could you have said that might have been more engaging?

**Listen.** What kinds of questions did you ask to elicit information?

Looking back, were your questions open (as opposed to leading)?

Y  N

Did your questions elicit information about the rational *and* emotional reality of your stakeholder?

Y  N

Did you regularly summarize or paraphrase what you heard?

Y  N

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Did you acknowledge out loud what you heard in the music of your stakeholder's communication? (tone, emotion, mood)?

Y  N

In hindsight, what could you have asked or said that might have demonstrated that you were listening more deeply?

**Frame.** What did you say to frame the issue?

If risks were required to frame the issue honestly and accurately, did you take them?

Y  N

Did you articulate a point of view?

Y  N

Did you get confirmation that you had framed the issue appropriately?

Y  N

In hindsight, what could you have said that might have framed the issue more effectively?

**Envision.** What did you say to move the conversation to the Envision stage?

Did you vividly describe the to-be state of affairs?

Y  N

Did you include both emotional and rational aspects of the to-be state?

Y  N

In hindsight, what could you have said that might have been more effective at this stage?

**Commit.** What did you say to invite a commitment to take action?

Did you get a commitment to move forward, in some way?

Y  N

Were the next steps clear and agreed-to?

Y  N

Did they require movement for both parties?

Y  N

In hindsight, what could you have said that might have elicited more satisfying results?

Tip: Solicit feedback from a colleague who was present for the conversation—or even better, from the actual stakeholder—to test the accuracy of your self-assessment.

Tip: Video or audio-record an actual conversation, or a mock conversation. Use this worksheet to debrief it.

## Worksheet: Living the Principles

For each trust principle, reflect on how you live by this principle (or not) in your day-to-day interactions with others. Jot down examples of how your attitudes and actions align with each principle, and examples of how they do not align.

Trust Principle	How Your Attitudes and Actions Align	How Your Attitudes and Actions Do Not Align
A focus on the other for the other's sake, not just as a means to your own ends		
A collaborative approach to relationships		
A medium- to long-term relationship perspective		
A habit of being transparent in all your dealings		

## Chapter 5: Five Trust Skills

There are five skills of trustworthiness that underpin everyday actions: the abilities to listen, partner, improvise, risk, and know yourself. They improve with focus and practice, and yield greater rewards as you get better at them; over time, they become natural and instinctive behaviors. *Chapter 5: Five Trust Skills* provides an overview. We refer back to these skills in the specific strategies and best practices for leading with trust throughout the rest of the book.

### Worksheet: Your Trust Skills: A Self-Assessment

Knowing your own strengths and weaknesses is the first step on the road to improving your trust skills. Try rating yourself on each of the five trust skills presented in this chapter.

- Score yourself toward the right side of the scale if you identify the trust skill as a natural or developed strength that you consistently bring to your relationships.
- Score yourself toward the left side of the scale if you are less developed or inconsistent in that area.

	Seldom	Occasionally	To a Considerable Degree	Almost Always
	1	2	3	4
<b>Listen.</b> An ability to listen with empathy, with a focus on the act of listening itself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Partner.</b> The ability to give and take, be in sync, move gracefully, and be in step and in tune with another	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Improvise.</b> The ability to be quick to respond, offer “yes, and” responses, subordinate your ego in the interest of collaboration, and give up looking good in exchange for being real	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Risk.</b> The willingness and ability to tolerate ambiguity and exposure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Know Yourself.</b> The ability to be introspective about weaknesses and strengths, and maintain a level of self-awareness that is required for good self-management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choose one skill where you gave yourself a 3 or 4. In what ways do you demonstrate this strength? What contributes to your success?



Choose one skill where you gave yourself a 1 or 2. What makes it challenging for you to apply this skill?



What did you learn about yourself as a result of this exercise?



Tip: Share your assessment with a trusted colleague to get her perspective and feedback.

# II: Developing Your Trust Skill Set

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## Chapter 6: Listen

Listening serves a far greater purpose than gathering information—it paves the way for you to be more influential. Listening requires adeptness at tuning in to others as well as expressing yourself on multiple levels. The payoff is a far greater likelihood of the other person listening to you.

*Chapter 6: Listen* explores empathetic listening in depth and introduces a tool—three-level listening—for putting it into practice. We also offer practical advice on how to listen masterfully in a variety of business settings, including one-on-one and group interactions.

### Worksheet: Listening for Trust

In general, what do you find most challenging when it comes to paying attention? Consider the Four Barriers to Paying Attention: a habit of talking, everyday distractions, a fear of intimacy, and the little internal voice.

Bring to mind an upcoming opportunity to listen to one or more people. Describe it briefly, and then use the questions below prepare for your interaction.

Opportunity:

What questions might you ask to elicit *rational* data and rational context?

What questions might you ask to elicit *nonrational* data and nonrational context?

Imagine what your partner might say in response to your nonrational questions. What will you say to demonstrate empathy? And what question might you ask next to be curious and further build intimacy? An example is in the first row.

What Your Partner Says	Empathetic Statement	Your Next Great Question
"I was in charge, and they doubted me."	"Sounds like you got the job done. Congratulations."	"What was that like for you?"

What did you learn as a result of this exercise?



## Chapter 7: Partner

In our increasingly connected world, the ability to partner is essential. It is a foundational skill that advances collaboration, synergy, and expanded results. You know the benefits of having good partnering skills, yet you may not apply them as consistently as you would like. *Chapter 7: Partner* explores partnering traits and the most common barriers to making them part of daily life. It also provides practical suggestions for strengthening your partnering muscle.

### Worksheet: Working Side by Side

Bring to mind two current relationships: one that is working well and one that isn't. Describe them briefly below, then answer the questions that follow.

#### Case 1: A Relationship That Is Working Well

Description:

#### Case 2: A Relationship That Is Not Working Well

Description:

Using the partnering traits below, how would you rate each relationship?

#### Case 1: A Relationship That Is Working Well

You maintain a mind-set of collaboration.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You work from a position of equal status.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You are willing and able to both lead and follow.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You balance assertiveness and cooperation.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You deal with disagreements and missteps productively and gracefully.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes

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You demonstrate a commitment to sharing responsibility for achieving a goal.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You take responsibility for your part in the partnership's successes and failures.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes

**Case 2: A Relationship That Is Not Working Well**

You maintain a mind-set of collaboration.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You work from a position of equal status.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You are willing and able to both lead and follow.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You balance assertiveness and cooperation.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You deal with disagreements and missteps productively and gracefully.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You demonstrate a commitment to sharing responsibility for achieving a goal.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes
You take responsibility for whatever part you play in the partnership's successes and failures.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes

For the traits present in the working-well relationship, what aids and sustains those?

For the traits not present in the not-working relationship, what is in the way?

What opportunities do you now see to close the gaps?

What actions will you take as a result? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 8: Improvise

Things do not always go as planned. There is no escaping those moments of truth that we all face when the unexpected occurs. Ironically, these unpredictable and stressful moments are some of your best opportunities to dramatically increase your trustworthiness—provided you are adept at thinking on your feet and allowing your best self to shine through. *Chapter 8: Improvise* explains the science behind a moment of truth. It also describes “thinking out loud” and “Yes, and ...,” two improvisational practices that improve your ability to be powerful and authentic in the moment.

### Worksheet: Transform Moments of Truth into Moments of Mastery

Use this worksheet to script your responses to questions or comments that trigger a fight or flight response. Transform your need to survive into the willingness to be authentic in a positive and productive way.

List moments of truth you either have faced or will likely face in the next week. What was said, or what will likely be said, that will put your reptilian brain on high alert?

Complete the table below. For each trigger identify what you might be thinking, what you would be tempted to say as a defense or explanation, and what thinking out loud with your thinking brain might sound like.

1	2	3	4
<b>If someone says:</b>	<b>What you might be thinking:</b>	<b>What not to say as a defense or explanation:</b>	<b>Thinking out loud in an authentic, positive, and productive way say this:</b>
“What experience do you have in XYZ industry?”	“Uh oh.”	“Only a few years in the industry, but I do have blah blah blah ...”	“I have two years in the industry. Is that a concern?”

1	2	3	4
<b>If someone says:</b>	<b>What you might be thinking:</b>	<b>What not to say as a defense or explanation:</b>	<b>Thinking out loud in an authentic, positive, and productive way say this:</b>

Tip: Share your assessment with a colleague to get reactions and suggestions.

Tip: Practice saying out loud what you have written in Column 4.

## Chapter 9: Risk

There is no trust without risk. The ability to build intimacy depends upon willingness and efficacy with risk-taking. Those who tend to avoid risk lose priceless trust-building opportunities, while those who master risk-taking as a skill learn to employ what is paradoxically the greatest risk-mitigation strategy. *Chapter 9: Risk* provides you with further insight into the relationship between trust and risk, along with a list of practices that expand your comfort and agility with risk-taking. You also get two tools for your risk toolkit: the three-question transparency test and Name It and Claim It.

### Worksheet: Risk-Taking as a Matter of Practice

Bring to mind a key stakeholder (e.g., client, prospect, colleague, staff member) with whom you have an exemplary trust-based relationship.

My stakeholder:

In what ways is risk present in the relationship? How do you take risks? How does your stakeholder take risks?

Now, bring to mind a key stakeholder with whom you'd like to have an improved—or even transformed—relationship.

My stakeholder:

Consider each of the six ways to practice risk-taking as described in this chapter. Which ones do you regularly apply? What opportunities do you see to improve the relationship by taking more risk?

Ways to Practice Risk-Taking	Frequency	Opportunities
1. Be proactive about reducing ambiguity	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	<input type="text"/>
2. Acknowledge uncomfortable situations out loud	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	<input type="text"/>

Ways to Practice Risk-Taking	Frequency	Opportunities
3. Deliver hard news promptly and concisely	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
4. Take responsibility for mistakes	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
5. Be willing to express your own emotions	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
6. Share something personal	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	

What actions will you take as a result of this reflection? Be specific.

What	By When	With Whom	Support I Will Ask For

What do you notice as a result of examining this relationship that might apply to other relationships?

## Worksheet: Name It and Claim It

Think about a challenging business relationship where topics are being avoided or negative patterns aren't being called out. What isn't being said that needs to be said? Describe it briefly:

Use the four steps to Name It and Claim It in this chapter to imagine a way that you might put this hard truth on the table with your partner.

	Example	Your Situation
<b>Step 1:</b> Define the issue, clearly and simply	<i>We don't have the executive sponsorship we need.</i>	
<b>Step 2:</b> List all your concerns about speaking the issue	<ul style="list-style-type: none"> <li>• <i>I might be wrong.</i></li> <li>• <i>I'll step on someone's toes.</i></li> </ul>	
<b>Step 3:</b> Turn your concerns into a caveat	<i>I may be completely missing the mark here, and I sure don't want to step on any toes.</i>	
<b>Step 4:</b> Put it all together	<i>"I may be completely missing the mark here, and I sure don't want to step on any toes. I'm concerned we don't have the executive sponsorship we need."</i>	

What next steps do you need to take from here?

## Chapter 10: Know Yourself

Introspection, the act of looking within, helps you lead with trust. Knowing yourself makes it possible to adjust to people and situations, facilitates empathy by making it easier to relate to others and be related to, and paves the way for more rewarding working relationships. *Chapter 10: Know Yourself* offers practical ways to increase your self-knowledge with guidance on how to look inward, turn blind spots into insights, and experiment regularly. We also suggest ways to use expanded self-awareness to increase your integrity and build trust.

### Worksheet: Self-Knowledge Is Power

This chapter identifies three approaches to expanding your self-knowledge: look inward, turn blind spots into insights, and experiment regularly. For each, choose one practice based on the ideas provided. What specifically will you do to achieve a level of self-awareness that, paradoxically, will lower your self-orientation and improve your ability to connect with others?

Approach	Description	Your Actions
<b>Look inward.</b>	There are myriad tools to help you profile yourself. Use them. Discover your values, preferences, strengths, and weaknesses. Get familiar with your inner voice—a critical guidepost for decision-making.	
<b>Turn blind spots into insights.</b>	See yourself as others do by seeking and integrating feedback. Bring to light aspects of yourself that are hidden from you but apparent to others.	
<b>Experiment regularly.</b>	Move away from the familiar and comfortable. Test out new skills, experiences, and relationships on an ongoing basis.	

# III: Developing Business with Trust

## Chapter 11: Trust-Based Marketing and Business Development

Demonstrating that you are trustworthy starts long before you land the job; in fact, it contributes to whether you land it in the first place. Trust-based marketing and business development helps to build your brand, gain sales, and create enduring client relationships. After all, people genuinely prefer to do business with those they trust. *Chapter 11: Trust-Based Marketing and Business Development* shows you how to apply trust principles in the early stages of new business relationships.

### Worksheet: Putting the Trust Principles to Work

Consider the myriad ways to apply the trust principles in the early stages of new business relationships to help to build your brand, gain sales, and create enduring client relationships. Use the examples provided in this chapter to identify areas of strength as well as areas of opportunity. What works for your business? In what ways could you take your business development and marketing to the next level?

Trust Principle	Areas of Strength	Areas of Opportunity
<p><b>Focus on your customer.</b></p> <ul style="list-style-type: none"><li>• <i>Share ideas</i></li><li>• <i>Give away free samples</i></li><li>• <i>Tell your prospects why they don't need you</i></li><li>• <i>Make cross-selling about your client</i></li></ul>		

Trust Principle	Areas of Strength	Areas of Opportunity
<p><b>Collaborate to drive new business.</b></p> <ul style="list-style-type: none"> <li>• <i>Collaborate internally first</i></li> <li>• <i>Approach networking collaboratively</i></li> <li>• <i>Collaborate your way into referrals</i></li> </ul>		
<p><b>Focus on relationships, not transactions.</b></p> <ul style="list-style-type: none"> <li>• <i>Build relationships with those you've screened out</i></li> <li>• <i>Promote relationships</i></li> </ul>		
<p><b>Be transparent with prospects and clients.</b></p> <ul style="list-style-type: none"> <li>• <i>Share your business model</i></li> <li>• <i>Share information</i></li> </ul>		

What actions will you take as a result of this reflection? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 12: Trust-Based Networking

Networks and community have always been important in business. Technology has changed some mechanics of networking, but not its fundamental nature. Trust-based networking is still about focus on the other: listening, respect, low self-orientation, and transparency. *Chapter 12: Trust-Based Networking* explores trust-based strategies to help you network in any context, and shows you how the Internet has and hasn't changed how you network.

### Worksheet: Trust-Based Networking in Practice

Trust-based networking is about focus on the other: listening, respect, low self-orientation, and transparency. The goal of trust-based networking is to help other people develop their businesses.

Consider the ten best practices for trust-based networking outlined in this chapter. To what extent do you already apply these practices? What opportunities do you see to take your networking to the next level?

Best Practices for Trust-Based Networking	Frequency	Opportunities
1. Be present.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
2. Recognize others' contributions.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
3. Collaborate.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
4. Talk about yourself less and your partner more.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
5. Add value.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
6. Diversify your network.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	

Best Practices for Trust-Based Networking	Frequency	Opportunities
7. Research.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
8. Make introductions.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
9. Take better notes.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
10. Keep making contact.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	

Prioritize your top two opportunities for networking improvement, and note them here:

1. \_\_\_\_\_

2. \_\_\_\_\_

What actions will you take as a result of this reflection? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 13: Delivering the Pitch

The way you conduct yourself in an initial meeting sets the tone for the relationship that follows. Some of the most powerful aspects of trust creation begin not after but during the sales process. In *Chapter 13: Delivering the Pitch*, we share nine rules for transforming the typical idea of the pitch into an activity that creates trust, transforms relationships, and differentiates your brand—to set you up for success from the outset.

### Worksheet: Transforming Your Pitch

Bring to mind a current sales situation where you see an opportunity to transform your pitch. Describe it briefly below, then answer the questions that follow. If you don't have a current situation, reflect on what you could have done differently in the past. The key is to bring a real and specific situation to mind.

Situation:

Of the Nine Rules for Transforming Your Pitch, which ones could you apply?

Rule 1: Sometimes the best pitch is no pitch.

Y  N

Rule 2: Don't skip the pre-pitch warm-up.

Y  N

Rule 3: Make it interactive.

Y  N

Rule 4: Have a point of view.

Y  N

Rule 5: Take the preoccupation out of talking price.

Y  N

Rule 6: With PowerPoint, less is more.

Y  N

Rule 7: Stop selling your qualifications.

Y  N

Rule 8: Do not denigrate the competition.

Y  N

Rule 9: Be willing to ditch the pitch.

Y  N

How would you apply the ones you selected? Be specific.

What actions will you take as a result? Be specific.

What	By When	With Whom	Support I Will Ask For

What do you see as a result of examining this situation that might apply to other sales situations?

## Chapter 14: Handling Objections

Working from trust means there are no objections in the traditional sales sense—there are simply issues of interest in an ongoing discussion. *Chapter 14: Handling Objections* explores how to change your thinking from *handling objections* to *having conversations*. We identify the types of wrong thinking that underlie the negativity of objections and offer three alternatives: thinking of objections as invitations, as concerns, and as opportunities. You will be able to immediately implement three specific ways to improve the quality of your conversations. The result: greater trust and more satisfying long-term results for all.

### Worksheet: Objection!

Write down the three statements that you interpret as objections—phrases you have heard in the past or anticipate hearing in the future. Pick those with the greatest emotional charge for you—the ones you least like to deal with or are most likely to take personally. Then translate these statements, How is each an invitation? What concerns or opportunities might be underlying what is being expressed?

Statement Interpreted as an Objection	How Is it an Invitation?	What Might be the Underlying Concerns?	In What Ways Is It an Opportunity?

How might you apply the best practices in this chapter—such as change your language, actively pursue concerns, and meet emotion with emotion—to interact differently with your buyers?

What did you learn as a result of this exercise?



## Chapter 15: Talking Price

Thinking and acting about price as a trusted advisor sets you apart from being just another sales rep. In *Chapter 15: Talking Price* we help you understand what is behind price concerns. We provide practical guidance on when to talk price, and offer a simple solution to price anxiety.

### Worksheet: The Price Is Right

Being aware of your own uneasiness with discussing price is the first and critical step towards easing everyone's natural discomfort with the topic. What worries, fears, or concerns do you have about talking price—especially early in the sales process?



Bring to mind the last time you lost a sale and were told it was because of price. Looking back, what was the quality of your relationship with the buyer(s)? What evidence did you have of the presence or absence of a trust-based relationship?



If you had an opportunity to re-create that sales situation, what might you do differently?



If you have had misunderstandings about scope, quality, or other factors related to price with past customers, what might you have done to prevent them?



What do you see as a result of examining this situation that might apply to other relationships?



## Chapter 16: Closing the Deal

The ABC mantra, Always Be Closing, typically destroys trust, along with the possibilities of future sales and repeat business. In *Chapter 16: Closing the Deal* we redirect you away from this counterproductive thinking and show you the value of leading with trust. You will understand the reasons not to Always Be Closing and you will benefit from specific ways to focus less on closing and more on helping.

### Worksheet: Stop Closing, Start Helping

Bring to mind two situations: (1) a time when you or your colleagues successfully completed a sale with a buyer—that is, you were able to help the buyer make decisions at a pace appropriate to him, while moving the relationship forward—and (2) a time when you did not successfully “close” a sale.

Describe them briefly below, then answer the questions that follow.

#### Case 1: A Successfully Completed Sale

Description:

#### Case 2: An Unsuccessful “Close”

Description:

Using the five practices to stop closing and start helping in this chapter, how would you assess each situation?

#### Case 1: A Successful Close

To what extent did you:

1. Let go of the sale itself?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
2. Understand your buyer's motives?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
3. Envision a positive future?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
4. Keep your personal needs out of it?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
5. Replace closing language with action language?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat

What other factors contributed to the positive result?

How would you characterize the quality of the relationship with the buyer today?

What practices do you want to carry forward into the next opportunity to successfully complete a sale?

### Case 2: An Unsuccessful "Close"

To what extent did you:

Let go of the sale itself?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
Understand your buyer's motives?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
Envision a positive future?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
Keep your personal needs out of it?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat
Replace closing language with action language?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Somewhat

What other factors contributed to the less-than-positive result?



How would you characterize the quality of the relationship with the buyer today?



What do you want to be sure to do differently the next time?



## Chapter 17: Developing New Business with Existing Clients

The best way to expand your business is to start with your existing relationships. In *Chapter 17: Developing New Business with Existing Clients*, we offer ways for you to nurture those relationships to make new business a natural progression of the relationship. We explore how you can sell upstream, effectively cross-sell, and request referrals.

### Worksheet: Develop New Business Naturally

Examine an existing client relationship to identify opportunities to expand the relationship. For relationships that teams are assigned to, this is an excellent team exercise.

**Organization/Client Name:**

What opportunities are there to move *upstream* in the organization?

What opportunities are there to cross-sell *within* the organization?

What opportunities are there to seek referrals *outside* the organization?

By your assessment, to what extent is your existing client inclined to help you? In what ways?

What, if anything, is missing in your current relationship?

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In what ways might you deepen the relationship before you attempt to expand the work you are doing?

What insight has this reflection provided about a conversation you might have with your client?

What actions will you take as a result? Be specific.

<b>What</b>	<b>By When</b>	<b>With Whom</b>	<b>Support I Will Ask For</b>

## Chapter 18: Selling to the C-Suite

The challenges of selling to the executive level are unique, partly due to the distinct executive role and partly due to the ways you must adjust your thinking and approach. In *Chapter 18: Selling to the C-Suite*, we explore what sets C-level executives apart and how you need to plan and respond accordingly. We focus on the mental preparation required to be effective at this level: managing your motives, your role, and your emotions. The chapter also includes a summary of best practices for making the most of your opportunity to enter the C-suite.

### Worksheet: Get Ready for the C-Suite

Bring to mind a C-level executive to whom you would like to make a sale.

My C-level executive:

Spend some time reflecting on what it's like in her world. Write a vivid description below. Consider her sphere of influence, resource constraints, risk of data overload and isolation, and complex decision making.

What did you learn as a result of this exercise?

Think about how you might specifically apply the nine best practices for successful C-suite meetings from this chapter to help you make the most of a meeting with him.

Best Practices for Successful C-Suite Meetings	Specific Applications
1. Bring the right mindset.	
2. Prepare, then adapt.	
3. Make connecting a priority.	
4. Bring five slides (if any), not fifty.	
5. Listen with empathy.	
6. Speak plainly and honestly.	
7. Master the 30-second answer.	
8. Do your thinking out loud.	
9. Watch the CXO's watch, not yours.	

What actions will you take as a result of this reflection? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 19: Reviving Stalled Relationships

When a buyer doesn't get back to you, you feel left in limbo. Your energy has nowhere to be directed—there may be no closed doors, but neither is there forward motion. The absence of a relationship is one thing, but a clear pattern of refusing to engage is something else. *Chapter 19: Reviving Stalled Relationships* explores how to engage aloof partners. We discuss whether, and how to walk away from stalled relationships—and when to talk.

### Worksheet: Relationship Resuscitation

Bring to mind a relationship with a buyer that seems to have stalled—nothing is happening, you don't know what is wrong, and you aren't sure there is a good way to talk about it. Working independently or with your team members, reflect on the relationship using the questions below and arrive at a point of view about what actions to take, if any.

My buyer:

At what point did the relationship stall?

What specific evidence is there of a stall (for example, three unreturned phone calls)?

What assumptions have you made—mentally or verbally—to explain the stall?

Setting these assumptions aside, how might you *acknowledge the communication barrier* directly with your buyer? What words could you use?

How might you *up the ante* to inspire interest in a new, larger issue? What point of view do you have to share?

What actions do you need to take as a result of this reflection? Be specific.

<b>What</b>	<b>By When</b>	<b>With Whom</b>	<b>Support I Will Ask For</b>

# IV: Managing Relationships with Trust

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## Chapter 20: Starting Off Right

You've won the job. The celebrations are over; the contracts are being drawn up. Now it's time to actually begin the work. After the high tension and adrenaline of the sales process, you may be tempted to feel that you have accomplished the hard stuff and that you can now work on autopilot. And while it is true that you are probably more effective if you relax, it is not true that you can just kick back. In *Chapter 20: Starting Off Right*, we will point out the three most common pitfalls of the kickoff stage, and offer a practical approach to getting off on the right foot.

### Worksheet: Recognizing Project Start-Up Pitfalls

How you start a project can have an outsized impact on the result of the project. Bring to mind the last time you were involved in a project kickoff. Describe the project briefly below. Then, answer the questions that follow.

Project:

In what ways did you fall prey to the common pitfalls of the start-up stage—putting tasks before relationships, putting the present before the past, and putting the plan before the culture?

In what ways did the start-up go well?

What did you learn that you will apply to your next project?



## Chapter 21: Accelerating Trust

It is often said that trust takes time, yet that is largely myth. In many ways, people form perceptions, trusting and non-trusting, with shocking speed. *Chapter 21: Accelerating Trust* addresses how to help both you and your partner form quick, high-trust assessments of each other, which lay the foundation for more trust in the future.

### Worksheet: The Speed Pass to Trust

Trust creation begins the instant you start interacting with someone. The key to accelerating trust is to hit the ground running with all your trust mind-sets and skillsets intact from the outset.

What mind-sets do you hold that may be slowing you down when it comes to building trust rapidly—about trust-building, about your customers, about your colleagues, about yourself? What new mind-sets could replace your current thinking?

Current Mindset	New Mindset
Example: Trust takes time.	High degrees of trust can be established in an instant.
Example: I don't make friends easily.	I'm easy to approach; people like to spend time with me.

Bring to mind a key stakeholder (e.g., client, prospect, colleague, staff member) with whom you would like to accelerate trust.

My stakeholder:

Why is this relationship important to you?

What outcomes are you committed to in this relationship?

Using the resources in this chapter, what best practices could you apply to rapidly increase the level of trust in the relationship across all four variables?

What specific actions will you take as a result?

What	By When	With Whom	Support I Will Ask For

What do you notice from examining this relationship that might apply to other relationships?

## Chapter 22: Navigating Politics

In your role as a trusted advisor, you do not need to be a skilled politician, but you must be aware of the role of politics and be respectful of, and not cowed by, its power. *Chapter 22: Navigating Politics* addresses why and how political situations present opportunities to serve others and create an environment richer in trust. We explore in depth the specific case of political situations when you are in a consultative role, and introduce a five-step model for navigating client politics. We also offer practical advice on what you can do when you are put on the spot, and best practices for dealing with organizational politics in any context.

### Worksheet: Possibility in Politics

Politics is an inevitable dimension of organizational life. It is neutral in itself—how you view and address politics can be negative or positive.

What mind-sets do you hold about politics that may be impeding your ability to be effective? Think about what words immediately come to mind when you think of organizational politics. What new mind-sets could replace your current mind-sets?

Current Mind-set	New Mind-set
Example: Politics is dirty business.	Politics is normal—it's a sign of life in an organization; nothing more, nothing less.

Bring to mind a specific situation that has a political dimension. Describe it:

Think about how you might specifically apply the seven best practices for dealing with organizational politics from this chapter to this situation.

Best Practices for Dealing with Organizational Politics	Specific Applications
1. See the organization as your client.	
2. Put politics on the table.	
3. Stay neutral.	
4. Frame the issue.	
5. Be a guide, not a decision-maker.	
6. Envision a positive future.	
7. Proceed with respect.	

What actions will you take as a result of this examination? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 23: Shifting from Tactics to Strategy

It's hard to lead with trust—and apply a long-term relationship focus—when you are working with people who pay greater attention to short-term tactics than to long-term strategy and pour their resources into immediate details. *Chapter 23: Shifting from Tactics to Strategy* provides insight into how to engage with others at a level of shared strategy. It challenges you with four key preparation questions that help shift the conversation from a tactical orientation to a strategic one, and provides specific examples of how to engage in a compelling way.

### Worksheet: Shifting a Conversation from Tactical to Strategic

Shifting a conversation from tactical to strategic starts with you.

Bring to mind a current situation where you see an opportunity to shift the conversation from tactical to strategic. Describe it briefly, and then answer the questions below. If you do not have a current situation, reflect on what you could have done differently in the past. The key is to bring a real and specific situation to mind.

Situation:

Next, ask yourself four key questions. Get really curious about each of these four areas, and you'll find that whole worlds open up that were previously obscured.

How am I part of the problem?

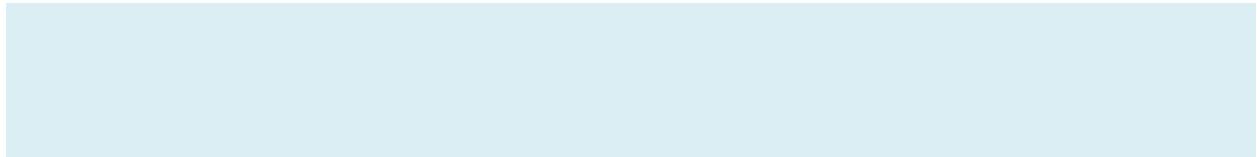
What barriers are preventing my partner from thinking strategically?

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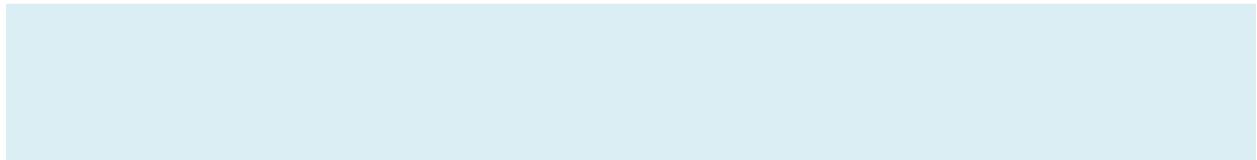
What really matters to my partner?



How can I help clear the path for what matters to my partner?



What do you see as a result of examining this situation that might apply to other situations?



## Chapter 24: My Client Is a Jerk

Difficult clients—and for that matter, bosses and colleagues—come in many different varieties. *Chapter 24: My Client Is a Jerk* provides you with insight into what is really going on with the difficult people, as well as what is really going on with you. It offers specific strategies for turning difficult relationships into rewarding ones, along with a five-step technique for reframing problems that both invites and inspires collaboration.

### Worksheet: Five Steps to a Better Problem Statement

Try your own hand at reframing a problem you are currently facing in one of your relationships.

Describe the situation:

Apply the five steps to a better problem statement:

Steps	Iterations	Insights
1. Write down the problem statement as authentically as you can state it.	(ORIGINAL) The problem is: <i>Example: "The problem is he doesn't get it and he's rude."</i>	
2. Take the (exclusive) focus off your partner.	(BETTER) The problem is: <i>Example: "We can't get him to understand, and he's disrespectful."</i>	<i>Example: Maybe we're not communicating in a way that works for him. Or maybe there's something going on with him that we don't know about, that has nothing to do with us.</i>

Steps	Iterations	Insights
<p>3. Remove any conjugation of the verb “to be.”</p>	<p>(BETTER) The problem is:  <i>Example: “We can’t get his attention or his respect.”</i></p>	<p><i>Example: There’s a difference between him being disrespectful and our ability to earn his respect. Perhaps we aren’t doing what we need to do to earn it. We haven’t asked, so we don’t know.</i></p>
<p>4. Make sure your “we” includes both parties.</p>	<p>(BETTER) The problem is:  <i>Example: “We have very different approaches to communication.”</i></p>	<p><i>Example: The fundamental issue is a communication issue. That’s the real problem to be solved. And maybe he’s as frustrated as we are.</i></p>
<p>5. Imagine showing it (or speaking it) to your partner. Would he vigorously nod his head in agreement?</p>	<p>(BEST) The problem is:  <i>Example: “We aren’t communicating effectively, and that leads to frustration for us all.”</i></p>	

What do you now see as a result of reframing the problem?

What actions will you take as a result? Be specific.

What	By When	With Whom	Support I Will Ask For

## Chapter 25: Dealing with Untrustworthy People

One of the most frequent reservations we hear about doing business with trust is: “I would love to conduct myself like that, but I don’t trust my boss [or my colleagues] to act the same way.” This sentiment generally underestimates what you can accomplish on your own. *Chapter 25: Dealing with Untrustworthy People* explores what you can do to lead with trust even when dealing with people in your workplace who seem untrustworthy. It explores strategies for dealing with trust conflicts, and offers criteria for deciding when it is time to walk away. This chapter will help you in cases where you feel personally conflicted, fearful, or compromised by the behavior of members of your own organization and are not certain how to respond.

### Worksheet: Constructive Confrontation

Bring to mind a relationship that seems untenable because there is something you cannot trust about your partner, yet you recognize constructive confrontation might help.

Evaluate the minuses and pluses of talking to him or her, and the probabilities of each outcome actually happening. Make the issue tangible, in a very simple way.

Talking: The Minuses	Probability (High/Med/Low)	Talking: The Pluses	Probability (High/Med/Low)

If your analysis still suggests you avoid the conversation, review it with a trusted friend or two.

Assuming you arrive at the conclusion to have the conversation, how might you approach your partner with a request for help and an honest willingness to listen? Script out the words you would say to open the conversation.

What do you notice as a result of this examination?

*The Trusted Advisor Fieldbook Worksheet Series*



What actions do you intend to take?



## Chapter 26: Trust-Based Negotiations

Bringing trust to the negotiating table not only turns transactions into win-win opportunities, but also creates relationships out of transactional negotiations. With trust-building as a part of your negotiating approach, you will experience more rewarding and profitable outcomes and business relationships that stand the test of time. *Chapter 26: Trust-Based Negotiations* addresses the subtle pitfalls that lead to negotiation mediocrity and describes how to apply the trust principles to any negotiation for better results in the short term and the long term.

### Worksheet: Negotiations: From Good to Great

Bring to mind a recent negotiation that you were involved in or observed. Consider the negotiating style, positioning, and approach taken by each of the participants. How were the trust principles absent or in evidence?

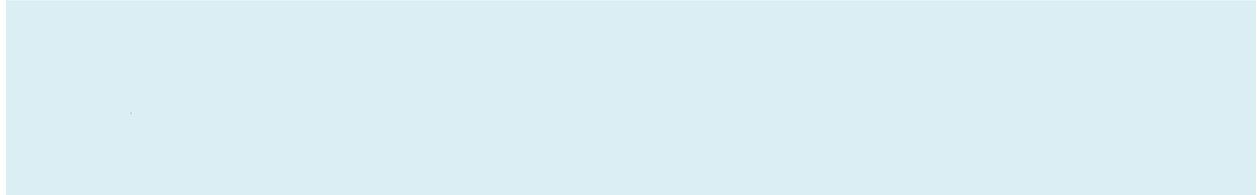
Other focus:

Transparency:

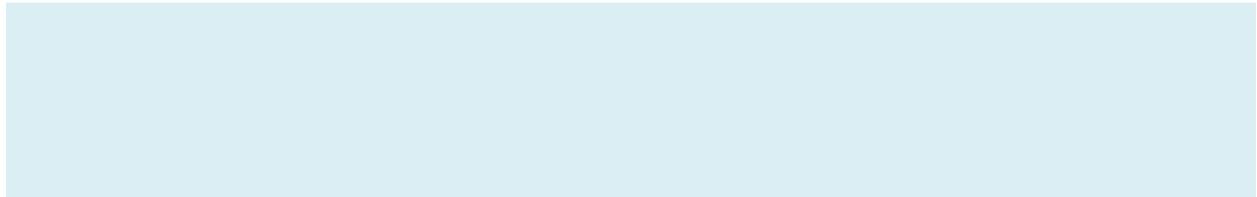
Medium- to long-term perspective:

Collaboration:

If the negotiation went well, what's made the biggest difference? If it fell short, what *would* have made the biggest difference?



What do you see as the prevailing mind-sets about negotiation in your environment in which you are working?



What can you apply during your next negotiation to build more trust in the process?



## Chapter 27: Building Trust at a Distance

Trust is critical for the effectiveness, creativity, and productivity of teams who collaborate from different locations. Leading with trust requires employing specific strategies to overcome the disadvantages of working in different locations. In *Chapter 27: Building Trust at a Distance*, we discuss the top trust-building challenge for virtual teams, how intimacy and reliability can compensate for the downside of distance, how to use communication technologies strategically, and how to apply best practices for building trust at a distance.

### Worksheet: Trust in Virtual Teams

Consider the ten best practices for managing virtual teams outlined in this chapter. To what extent do you already apply these practices? What opportunities do you see to take your team(s) to the next level?

Best Practice for Managing Virtual Teams	Frequency	Opportunities
1. Make face time happen.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
2. Use the right tools.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
3. Increase team intimacy.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
4. Make your work process consistent.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
5. Set communication standards.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
6. Set goals and expectations.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
7. Avoid over-communication and interruption.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	

<b>Best Practice for Managing Virtual Teams</b>	<b>Frequency</b>	<b>Opportunities</b>
8. Be available.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
9. Be explicit.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	
10. Model trust-based communication.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Sometimes	

# V: Building and Running a Trustworthy Organization

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## Chapter 28: Making the Case for Trust

Building a trust-based organization frequently requires persuading others of the value of trust. The case for trust can be made on many dimensions. In *Chapter 28: Making the Case for Trust* we focus on those that are most likely to be of immediate interest to you and your organization: trust at the organizational level and the positive economic impact. We also explore the social and ethical benefits of trust.

### Worksheet: Your Custom Case

The case for trust can be made on many dimensions.

In what ways do you see the benefits of trust present in your organization today?

Economic:

Social:

Ethical:

What opportunities exist to increase organizational effectiveness by increasing trust?

Economic:

Social:

Ethical:

## Chapter 29: Creating a Culture of Trust

Compared to many change initiatives, creating a culture of trust requires a greater emphasis on personal change, and a lesser emphasis on traditional organizational tools like role definitions, processes, and incentives. The two primary tools for trust initiatives are values and virtues. In *Chapter 29: Creating a Culture of Trust* we describe these in detail, offer assessment tools for each, and suggest mechanisms by which to introduce them into an organization.

### Worksheet: Your Trust Roadmap™

The Trust Roadmap™ shows specific ways that the trust principles manifest, or not, at the organizational level. It identifies key areas for concern and action. Use it to diagnose the current status of your organization and to clearly identify priorities for a trust initiative.

Using the framework below, and the examples in this chapter, create your own custom Trust Roadmap™. Design it with at least one entry per cell.

		A	B	C	D
		Collaboration	Medium- to Long-Term Perspective	Transparency	Other Focus
1	<b>External Relationships.</b> How your organization relates to other organizations.	<i>Example: You work together with customers, suppliers, and others to respond innovatively to opportunities and problems.</i>	<i>Example: You consider past, present, and future when negotiating a current deal with people outside of the organization.</i>	<i>Example: Your organization is open and honest in its dealings with people outside of it.</i>	<i>Example: In working with customers, suppliers, and clients you put their needs first, not yours.</i>
2	<b>Leadership.</b> How your leaders behave, both within and outside the organization.	<i>Example: Your leaders seek opinions and work together with employees at all levels as part of the decision-making process.</i>	<i>Example: Your leaders are willing to sacrifice short-term gains for the long-term benefit of the organization.</i>	<i>Example: Employees understand your leadership's rationale for making decisions.</i>	<i>Example: Your leaders set the right examples by putting others first, even at the expense of short-term gain.</i>

		A	B	C	D
		Collaboration	Medium- to Long-Term Perspective	Transparency	Other Focus
3	<b>Structure.</b> How your organization is set up to get work done.	<i>Example: It's clear your teams/groups/divisions coordinate their efforts.</i>	<i>Example: There's an executive handoff between the people who sell the work and the people who do the work.</i>	<i>Example: Employees understand who does what at your organization.</i>	<i>Example: Your leaders set the right examples by putting customers first, even at the expense of short-term gain.</i>
4	<b>Rewards.</b> How virtues and values are positively reinforced.	<i>Example: Your organization encourages collaboration.</i>	<i>Example: Your organization acknowledges people for doing the right thing from a long-term perspective.</i>	<i>Example: Your employees feel fairly dealt with regarding money, advancement, and recognition.</i>	<i>Example: You can ensure that your rewards and incentives don't get in the way of employees' doing the right thing.</i>
5	<b>Processes.</b> How work actually gets done.	<i>Example: There is no need to go around the system to get things done at your organization.</i>	<i>Example: your internal business processes encourage long-term thinking (for example, strategic planning, project planning).</i>	<i>Example: The way things get done at your organization is clear to employees.</i>	<i>Example: Your planning and reporting processes (for example, account planning, management reporting) encourage a focus on your customers.</i>

Use surveys, focus groups, interviews, or a combination to determine how well your organization scores. What are your organization's strengths?

What are the critical areas for improvement?

What actions will you take as a result?



## Chapter 30: Trust in Internal Staff Functions

In the world of professional services, the term *trusted advisor* conjures up images of subject matter experts working with external clients. But there is another group for whom the term is equally relevant: those in internal roles who provide the same kind of specialized expertise within their organization. *Chapter 30: Trust in Internal Staff Functions* is specifically written for people in internal staff functions such as Legal, Human Resources (HR), Information Technology (IT), and Finance. It examines the external misconceptions that impede building trust, and identifies specific ways for specialists on the inside to increase the levels of trust and influence with internal clients.

### Worksheet: Perception Is Reality

Understanding and accepting how you are perceived in your internal staff function is the first step in building trust within your organization.

Consider the following questions. Note: This is an excellent team exercise.

How is your staff function perceived by the organization as a whole? Be honest in your responses; not wishful. Consider key stakeholder groups when you do your analysis, and what relationship strengths and weaknesses they see in you. What do they say about you? In what ways do they (or don't they) involve you in strategic conversations or projects? How would you characterize the majority of your relationships with members of that group?

Stakeholder Group	Relationship Strengths (Their Perception)	Relationship Weaknesses (Their Perception)
1.		
2.		
3.		

Stakeholder Group	Relationship Strengths (Their Perception)	Relationship Weaknesses (Their Perception)
4.		
5.		

Envision the *desired future state*: How do you want to be perceived? Involved? Related to? Write a vivid description.

How might your function *collectively build trust* within the organization as a whole?

In what ways can you *personally build trust* with your stakeholders?



Tip: Share your assessment and ideas with your stakeholders and get their feedback.

## Chapter 31: Training for Trustworthiness

Can people learn how to be trustworthy? The short answer is yes. *Chapter 31: Training for Trustworthiness* looks at what is required to teach the mind-sets and skills of trustworthy people. It explores specific training strategies to inspire aha moments and make their lessons stick. It also provides you with tactics for creating a supportive learning environment and strategically involving key stakeholders.

### Worksheet: Design for Success

Consider the design of your organization's existing or planned trustworthiness training. Which best practices for setting off the "aha" are included?

- Use simple frameworks.
- Provide out-of-character experiences.
- Fail forward.
- Tell stories.
- Encourage the tough conversations.
- Link in real-life situations.
- Incorporate personal feedback.
- Make time for reflection.
- Mix up learning groups.

For the best practices that you have checked, what's working well? Why?

What might you consider revising or adding?

In what ways does your design make provisions for sustaining aha moments?

- Set up action learning groups or learning labs.
- Arrange check-in calls and office hours.
- Schedule teach-back assignments.
- Create online learning communities.
- Continue learning with book clubs.
- Present 60- to 90-minute webinars to refresh and advance lessons.
- Set up peer coaching.
- Arrange professional coaching.
- Repeat personal assessments.
- Provide mastery programs for select leaders.
- Train-the-coach/train-the-trainer.

Consider your organizational strategy and culture, along with time, budget, and resource constraints. In what ways is the mix you have selected well-positioned to support your efforts?



What might you consider adding or revising?

