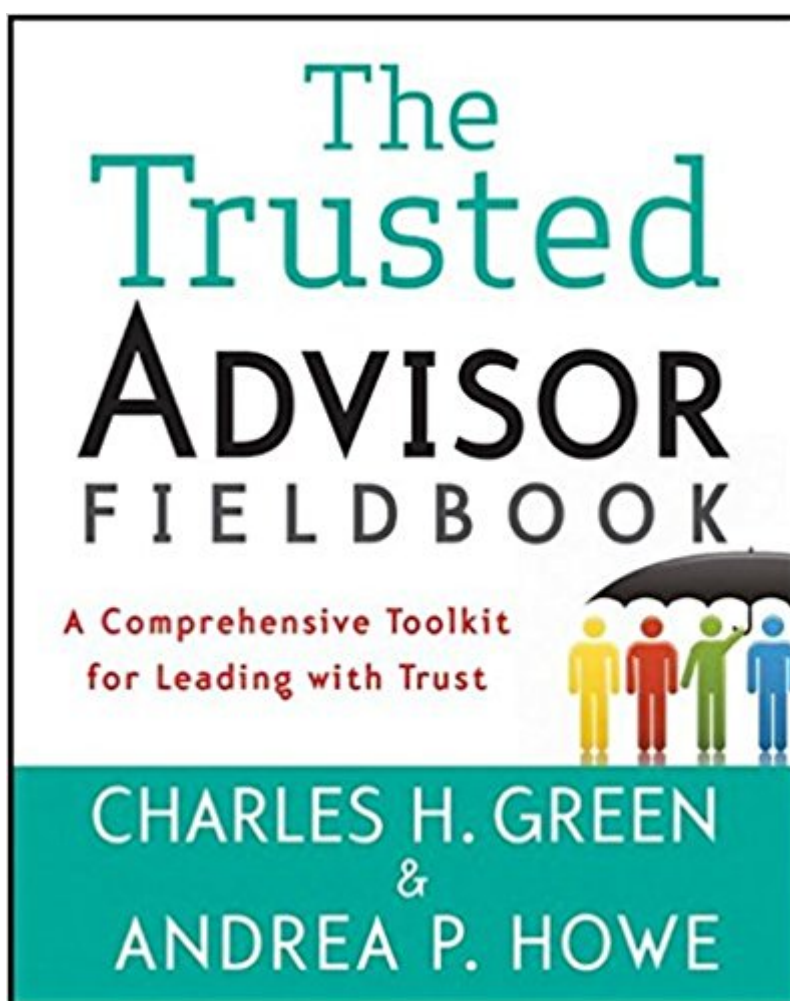


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# The Trusted Advisor Fieldbook: A Comprehensive Toolkit For Leading With Trust



## Synopsis

A practical guide to being a trusted advisor for leaders in any industry In this hands-on successor to the popular book *The Trusted Advisor*, you'll find 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. This pragmatic workbook delivers everyday tools, exercises, resources, and actionable to-do lists for the wide range of situations a trusted advisor inevitably encounters. The authors speak in concrete terms about how to dramatically improve your results in sales, relationship management, and organizational performance. Your success as a leader will always be based on the degree to which you are trusted by your stakeholders. Each chapter offers specific ways to train your thinking and your habits in order to earn the trust that is necessary to be influential, successful, and known as someone who makes a difference. Self-administered worksheets and coaching questions provide immediate insights into your current business challenges Real-life examples demonstrate proven ways to "walk the talk" Action plans bridge the gap between insights and outcomes Put the knowledge and practices in this fieldbook to work, and you'll be someone who earns trust quickly, consistently, and sustainably—in business and in life.

## Book Information

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## Customer Reviews

A practical guide to being a trusted advisor for leaders in any industry Your success as a leader depends on your stakeholders' trust. In this hands-on companion to the bestselling *The Trusted Advisor*, you'll find actionable tools, exercises, and resources for the situations that any leader

inevitably encounters. Put them to work, and you'll earn trust quickly, consistently, and sustainably—in business and in life. "Leaders and aspiring leaders understand the central importance of trust-based relationships. The Trusted Advisor Fieldbook is a practical guide for leaders at all levels in building and maintaining relationships with clients and colleagues. Success requires this critical asset." —Jim Quigley, former CEO of Deloitte Touche Tohmatsu Limited "This is an extensive and in-depth collection of practical tools and exercises that will help anyone improve his or her ability to earn trust. A major contribution." —David Maister, coauthor of The Trusted Advisor "This book is a really valuable resource for anyone who needs to sharpen their trust-building skills—and who doesn't? It's packed with practical tools and ideas." —Matt Nixon, VP Organisation Effectiveness, Royal Dutch Shell "Everyone talks about being a 'trusted advisor,' but few people have real science behind it. Green and Howe have got experience, data, and perspective; they don't shy from the really difficult tasks in client relationships. We have found them to bring practical, tactical expertise to the ideas already developed in The Trusted Advisor and Trust-Based Selling." —Mark Hawn, Managing Partner, Accenture "When The Trusted Advisor published in 2000, I called it a brilliant and practical book. The Trusted Advisor Fieldbook is even more practical—and instructive—on how to develop trustworthiness, both in yourself and your organization." —Tom Peters, coauthor of In Search of Excellence

Charles H. Green is founder and CEO of Trusted Advisor Associates. The author of Trust-Based Selling and coauthor of The Trusted Advisor, he is a noted speaker on trust in sales, within organizations, and in external business relationships. Andrea P. Howe is part of the leadership team of Trusted Advisor Associates. She is also the founder and President of BossaNova Consulting Group. A veteran consultant and seminar leader, Andrea specializes in serving global professional services firms.

Almost exactly four years ago today, I wrote the following about the predecessor to this text: "Truly, the content that Maister, Green, and Galford provide in 'The Trusted Advisor' is absolutely brilliant. The only other consulting text that comes to mind which meets the quality of this work is 'The Secrets of Consulting', by Weinberg (see my review). And while 'Secrets' is an incredibly informative and entertaining masterpiece, the three authors who collaborated for this piece have provided a great service to anyone involved with advising other individuals, regardless of profession." What Green and Howe offer with this recent effort follows well in these earlier footsteps. In the words of the authors, this is "a more detailed how-to guide for people in any professional role", and I could

not agree more. This book is not a replacement, but a compliment, providing a hands-on approach to developing and maintaining trust-based relationships that will certainly cause me to recommend it to colleagues. The material that the authors present is broken down into five parts: Part 1 ("A Trust Primer"), Part 2 ("Developing Your Trust Skill Set"), Part 3 ("Developing Business with Trust"), Part 4 ("Managing Relationships with Trust"), and Part 5 ("Building and Running a Trustworthy Organization"). These parts are broken down into 31 chapters, each typically containing just a few pages, which greatly helped my digestion of the content as well as my focus on specific areas of trust. In addition, the conclusions of each of the chapters provide truly thought-provoking worksheets that challenged me during my reading and will continue to challenge me, as I expect to revisit these worksheets in the future as I grow as a professional. And one of the specific aspects about this book that I appreciated, as with "The Trusted Advisor", is all the lists throughout the book (164 in total, more than a 5-fold increase from the earlier effort!) that are also contained in a comprehensive appendix. As a consultant, chapter personal favorites include Chapter 1 ("Fundamental Truths"), Chapter 3 ("The Dynamics of Influence"), Chapter 4 ("Three Trust Models"), Chapter 6 ("Listen"), Chapter 7 ("Partner"), Chapter 8 ("Improvise"), Chapter 9 ("Risk"), Chapter 15 ("Talking Price"), Chapter 21 ("Accelerating Trust"), Chapter 23 ("Shifting from Tactics to Strategy"), Chapter 24 ("My Client is a Jerk: Transforming Relationships Gone Bad"), and Chapter 25 ("Dealing with Untrustworthy People"). Based on my experience, all professionals will find valuable what the authors present within the chapters of Part 2. While many other texts address the fact that self-knowledge is essential, if any potential readers of this book do not have time to read everything that the authors have to share, the other chapters within this portion of the book (on listening, partnering, improvising, and risk-taking) should be considered required reading for everyone who works with clients to any degree. The "Trust Equation",  $\text{Trust} = (\text{Credibility} + \text{Reliability} + \text{Intimacy}) / \text{Self-Orientation}$ , or  $T = (C + R + I) / S$ , is revisited and expanded upon by the authors alongside two other trust models in Chapter 4, resulting in one of the best discussions in the text. "Self-orientation, which we like to call your 'S', rears its ugly head most often when you feel some sort of fear: fear of looking bad, fear of rejection, fear of loss. All of these fears are perfectly normal. And they are what makes your S look big. What makes a difference is having the ego strength to see the fear, acknowledge it, 'get off your S', and move on. After all, obsessing about Big S mistakes is just more Big S." Following this discussion, "The Trust Creation Process", a five-step model (engage, listen, frame, envision, and commit) in which the authors stress order, is presented, followed by "The Trust Principles" that include a focus on the other, a collaborative approach, a medium-to-long-term perspective, and a habit of being transparent. As the authors explain, "being or becoming trustworthy

cannot be reduced to pure behaviors. Your actions are driven by your beliefs, and your beliefs are driven by your values or principles. Trustworthy behavior is far too complex to fake without beliefs and values behind it. If your values don't drive you to behave in a trustworthy manner all the time, you will be found out quickly. Hence, the trust equation and the way you use the trust creation process are really just outcomes of the principles you hold, the trust principles. The way to become trusted is to act consistently from those principles." And later, the authors introduce a refrain that is common throughout the rest of the text, especially echoing throughout part 3, which personally brought to mind the negative repercussions an ABC (always be closing) mindset made famous by Alec Baldwin in *Glengarry Glen Ross* is likely to bring: "Focusing on relationships nurtures transactions, whereas focusing on transactions chokes off relationships."

As a Career Strategist and Coach, I am always looking for advice and content that will help my clients build out their personal brands, leadership competencies or their careers. I bought this book for a webinar I delivered on reputation. I am glad I did! The book is a very easy read, the language is not too hard to access and it is not boring. I am especially liked the chapters around listening and influence - they have proven useful frameworks for my coaching sessions. I also like the fact that at the end of every chapter, there are worksheets for you to take action on what you've just read.

This field book is a great resource for the *Trusted Adviser* book. Some very helpful surveys, self-assessments and AH Ha moments. Thank you.

So rich in content that anyone hungry to take their results to the next level will consider this a **MUST** have. The book is filled with relevant topics, powerful caselets, and real life stories that even the most seasoned professionals will learn something new. I really like the practical applications and thoughtfully prepared worksheets that make this more than a book -but an active journal they'll want to keep coming back to. Charlie and Andrea bring decades of wisdom accrued from hundreds of trainings, speaking events, and personal consulting experience from the best of the best corporations worldwide; they give it away in simple to understand terms. I love it!!!

Received as part of a 3 pack and each book has easy to use applicable information

A **MUST** Have book for those looking to improve both their interpersonal and professional skills... Had the pleasure to meet one of the authors on a workshop/seminar and I highly recommend both

because of the quality imprinted on this product and their consultant services.

If you have read "The Trusted Advisor" you will find that this field book is more than a practice guide for professionals. It extends the lessons concerning trust by showing practical ways to understand their application to a networked world.

Great book describing a different model for relating with others to promote development of trust. The authors are also quite approachable and willing to respond to queries about the book.

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