



## The Trusted Advisor

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### Customer Relationships – Building Trust

- Today we will discuss....
  - Defining a trust relationship
  - The four key elements trust
  - Techniques we can use
  - Some helpful pointers



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Benefits of being viewed as a “Trusted Advisor”...

Your customers will...

- Ask for your advice
- Bring you in on more complicated, strategic issues
- Share information
- Give you the benefit of the doubt
- Protect you
- Refer you to others
- Give you more business



What characterizes a trust relationship?

- It grows, rather than appears
- Is rational AND emotional
- Presumes a two-way relationship
- Is different for the customer than for us
- Is personal



Essential elements of trust

- Credibility
- Reliability
- Intimacy
- Low focus on self



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How do you enhance credibility?

- NEVER lie, ever
- Don't say something that sounds like a lie
- Tell as much truth as you can without injuring others
- If you don't know, say it..... Immediately
- Don't show off
- Be expressive, relax

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How do you enhance reliability?

- Deliver small, and work your way up
- Don't make BCS promises
- Send meeting material in advance
- If there is a meeting, have a goal
- Follow-up....Follow-up....Follow-up!

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Getting ready to make a commitment.....

.....Avoiding "Best Case Scenario" Promises

- What can get in the way here?
- What do we intend to do about it?
- Who needs to be brought into the loop?
- Who should do what?
- What information do we need?
- What are the key deadlines?

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### When You Commit, Manage Expectations

- Be clear on what you will do and will not do
- Be clear on what the customer will do and will not do
- Check for landmines
- Decide how you will communicate and to whom
- Decide how you will be measured
  - What does "success" look like?



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### Put the Moose on the Table!

- Dealing with problems & difficult issues....

- Acknowledge the difficulty of raising an issue
- Accept responsibility for raising it
- Make a direct statement about the issue itself
- Maintain your composure & professionalism



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### How do you enhance intimacy?

- Don't be afraid, it's NOT easy
- It's more than candor
- Look for the fun
- Test the line
- Be yourself
- Practice



### How do you lower your self-focus?

- Be willing to say "I don't know"
- Reflectively listen, not passively listen
- Avoid answering too quickly
- Refrain from always having the last word
- Relax the need to appear intelligent
- Acknowledge the customer's feelings
- Put yourself in the customer's shoes

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### What good listeners do....

- Probe for clarification and detail
- Summarize well
- Let the customer "get it out of his or her system"
- Listen for what's different, not for what's familiar

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### What great listeners DON'T do....

- Interrupt
- Match the client's points
- Editorialize in mid-stream
- Jump to conclusions
- Give you their idea before hearing yours
- Judge you
- Take calls or interruptions in a customer meeting

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## Dealing with different kinds of people

- Work out your plan in advance
- Think about their personal priorities....
  - Are they ambitious?
  - Risk averse?
  - Comfortable?
- Figure out what you have in common
- Approach the issue from their perspective



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## Building Trust Can Cause Concerns

- It can feel personally risky
- Content mastery is not enough
- Can't overcome the fear of looking stupid, so we assert!
- This approach discounts the value of EXCELLENCE
- I gave them my opinion and now I'm stuck with it
- Building trust is S-L-O-W
- I can't be humble!



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## Things to Remember

- You don't have to prove yourself every 10 seconds
- "Gee, what's behind that?"
- Is your pulse racing? Say so, out loud
- Have I earned the right to give an answer?
- Am I trying to win an argument, or is it a conversation?
- Don't blame anybody for anything anytime
- More value is added through problem definition than answer
- Does my gut bother me? If so, lets talk



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