

FROM RISK TO RELATIONSHIP: THE ART OF BUILDING TRUST

WHO I AM



MOM

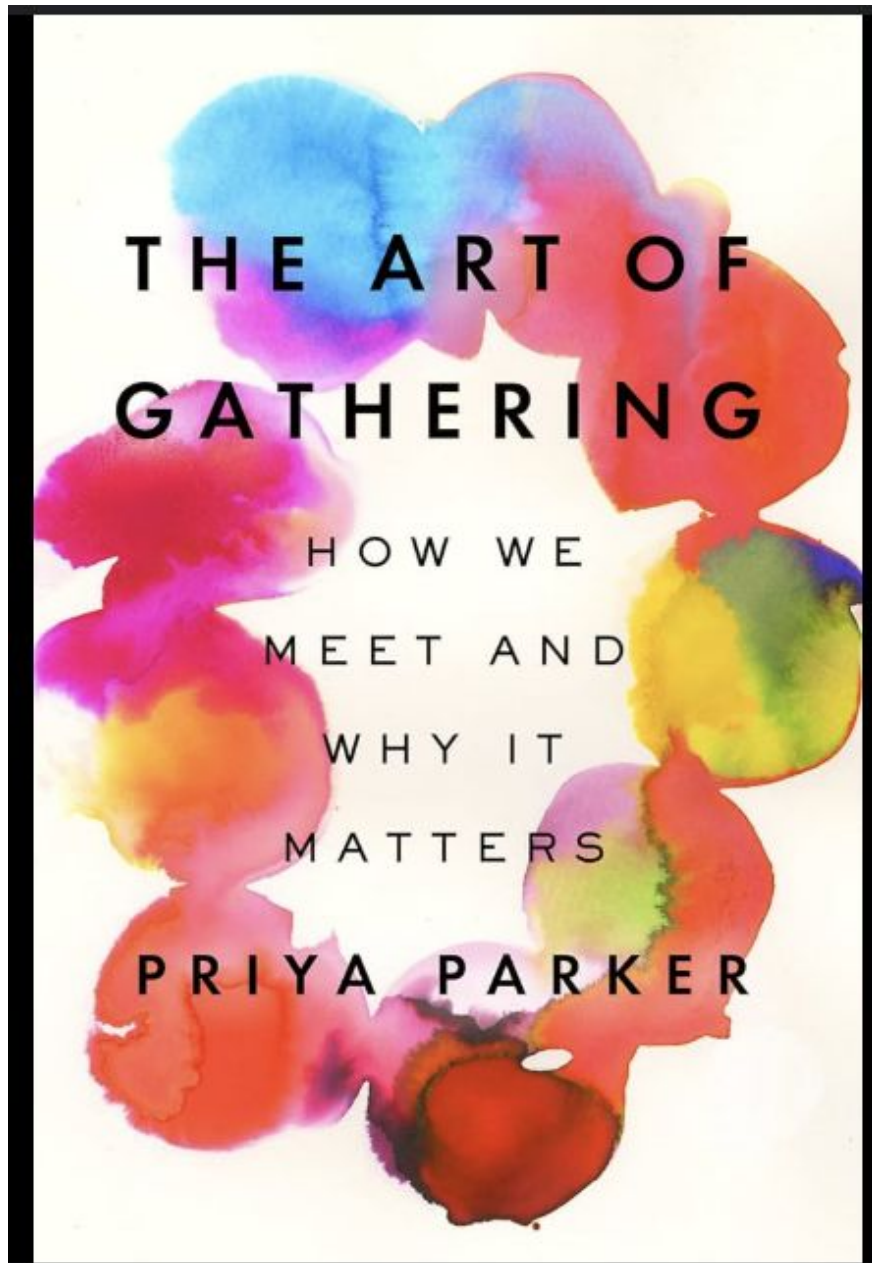


STEPMOM AND WIFE



DOG MOM

WHO I AM



BOOK CLUB LEADER



FAMILY VACATION PLANNER



NEIGHBORHOOD WALKER

WHAT I DO



COO - REVOLUTION GROUP



FOUNDER - TECH TO TRUST



FACILITATOR - MINDFUL RETREATS

HOW DO I KNOW WHAT I'M TALKING ABOUT?



12+ YEARS IN CONSULTING
GO-TO-WHEN STUFF HITS THE FAN
GO-TO WHEN STUFF HITS OTHER PEOPLE'S FANS

HOW DO I KNOW WHAT I'M TALKING ABOUT?



FREQUENT SPEAKER AT TRADE SHOWS AND EVENTS
C-SUITE AWARD WINNER THROUGH CBUS BIZ FIRST 2025

HOW DO I KNOW WHAT I'M TALKING ABOUT?



LEAD INTERNAL COHORTS

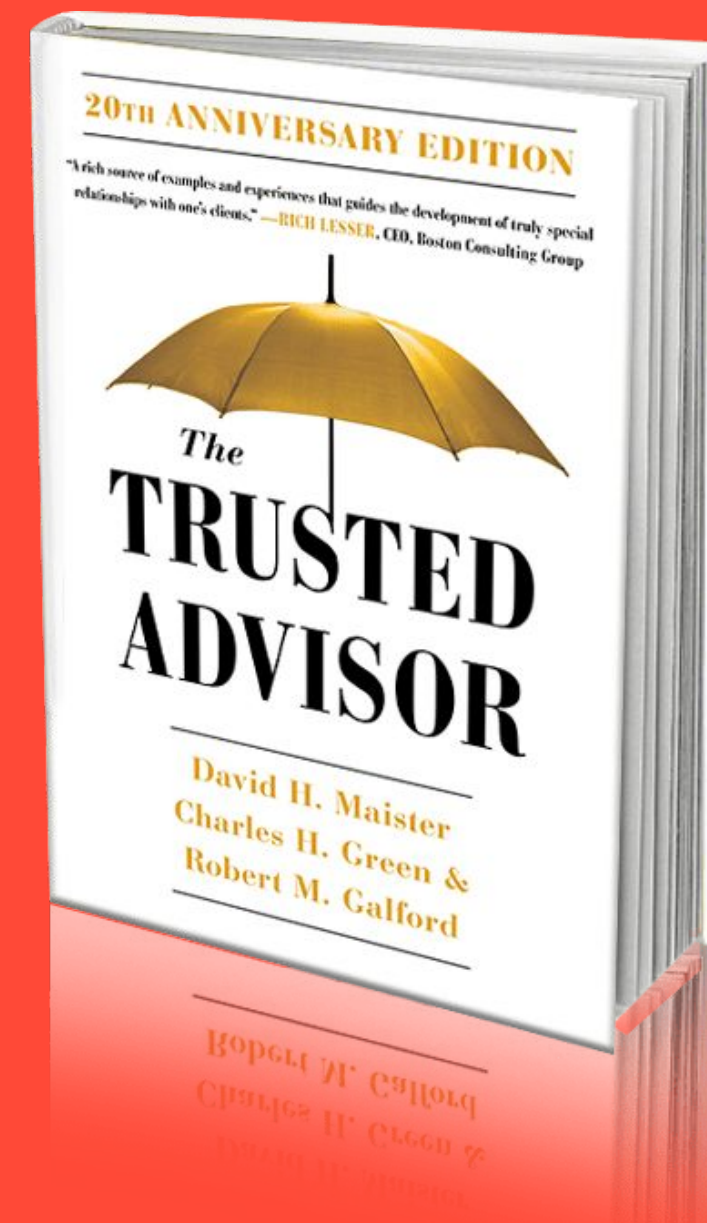
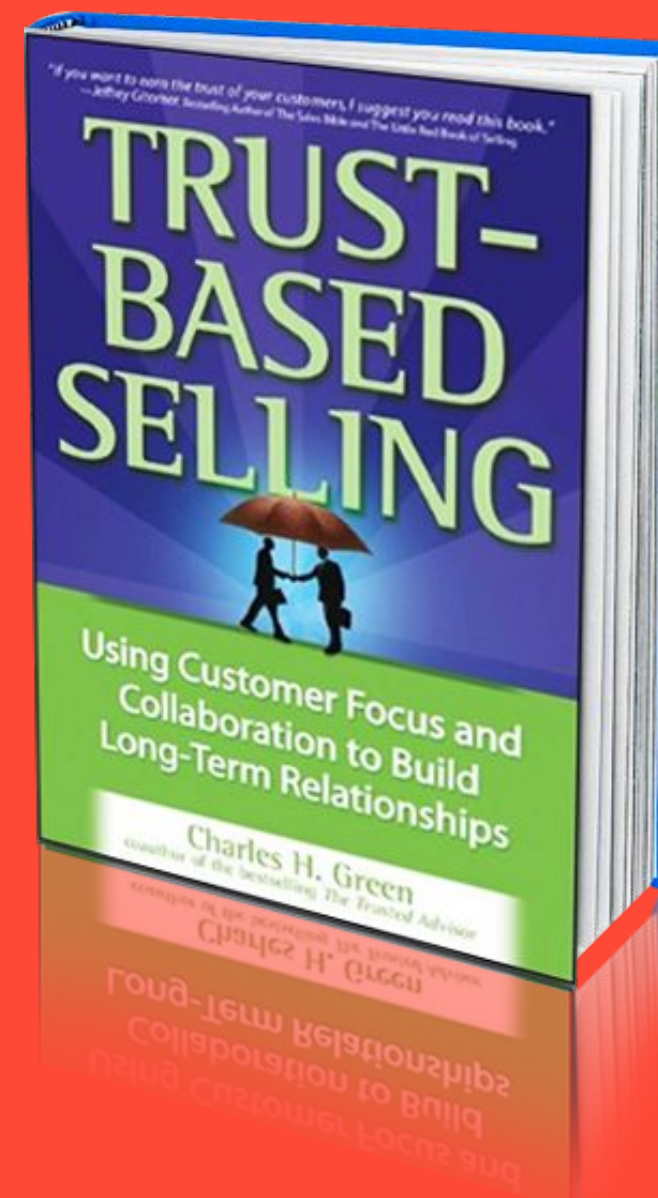
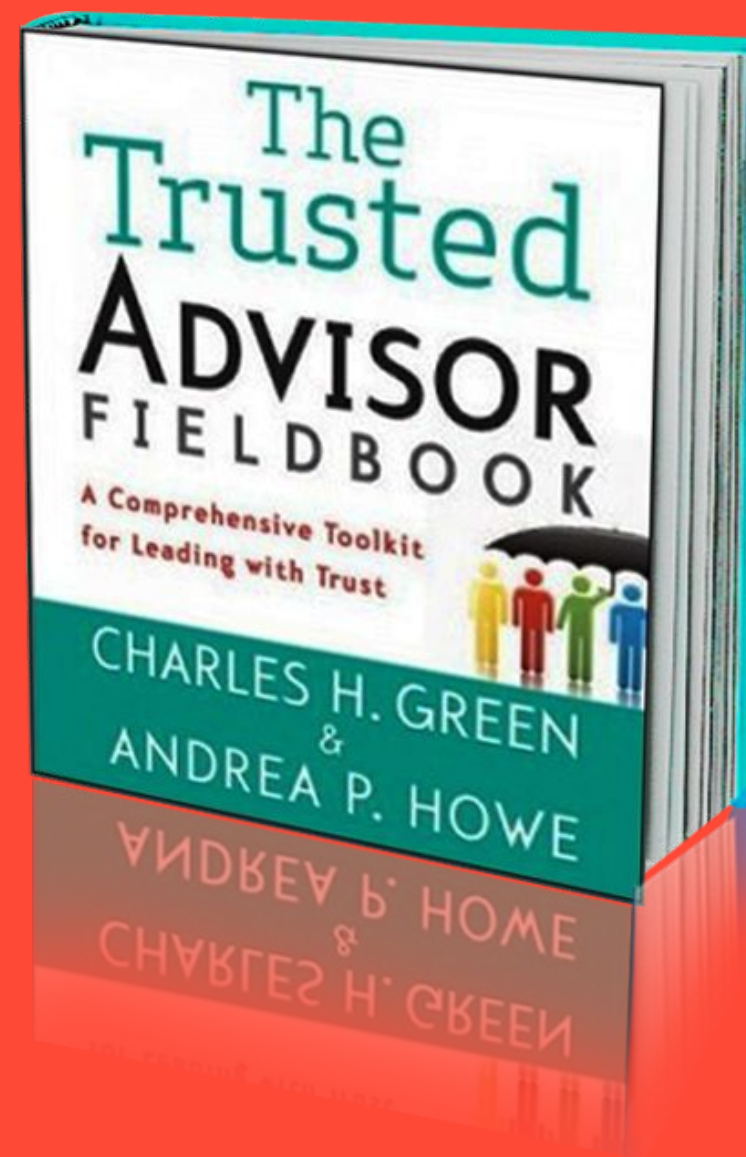
CLIENT TURNOVER WENT FROM 1/ MONTH TO 0 IN 1 YEAR

CLIENT SATISFACTION INCREASED BY 30%

CLIENTS WHO QUESTIONED BILLS NOW PAY WITH EASE

EMPLOYEES FEEL 25% MORE CONFIDENT IN THEIR COMMUNICATION

HOW DO I KNOW WHAT I'M TALKING ABOUT?



CERTIFIED TRUSTED ADVISOR ASSOCIATES

WWW.TRUSTEDADVISOR.COM

-20 YEARS HELPING BUSINESS PROFESSIONALS BUILD STRONGER RELATIONSHIPS

-WORKSHOPS, ONLINE LEARNING, CUSTOMER PROGRAMS, COACHING

**THIS SESSION
SHOULD BE
INTERACTIVE.**

(THINK, WORKSHOP)

((YES, I KNOW IT'S A WEBINAR.))



**MY GOAL:
YOU LEAVE...**

**1) WITH A BIT MORE SELF
AWARENESS**

AND

**2) WITH ONE ACTION YOU CAN
TAKE TO IMPROVE A
RELATIONSHIP**



CALL TO MIND A CHALLENGING RELATIONSHIP

- A COWORKER, CLIENT, CUSTOMER OR PERSONAL RELATIONSHIP
- IN A CURRENT SITUATION
- WHERE THE LEVEL OF TRUST ISN'T WHERE IT COULD BE



CALL TO MIND A CHALLENGING RELATIONSHIP



**WHAT IS ONE THING
YOU WOULD GAIN
FROM HAVING MORE
TRUST IN THIS
RELATIONSHIP?**



IF PEOPLE FULLY TRUSTED ME....

ASSUME POSITIVE INTENT

SEEK YOU OUT SOONER

WORK GETS DONE FASTER

BETTER QUALITY WORK LIFE

COSTS AND COMPETING GO DOWN



IF PEOPLE FULLY TRUSTED ME...

THEY'LL RECOMMEND YOU

STRONGER AGREEMENTS

ACCEPT YOUR ADVICE

GREATER CLIENT IMPACT

MORE FORGIVING OF MISTAKES



AGENDA:

- 1) DEFINING TRUST
- 2) BEING TRUSTWORTHY
- 3) YOUR TRUST QUOTIENT
- 4) TRUST IN ACTION



AGENDA:

1) DEFINING TRUST

2) BEING TRUSTWORTHY

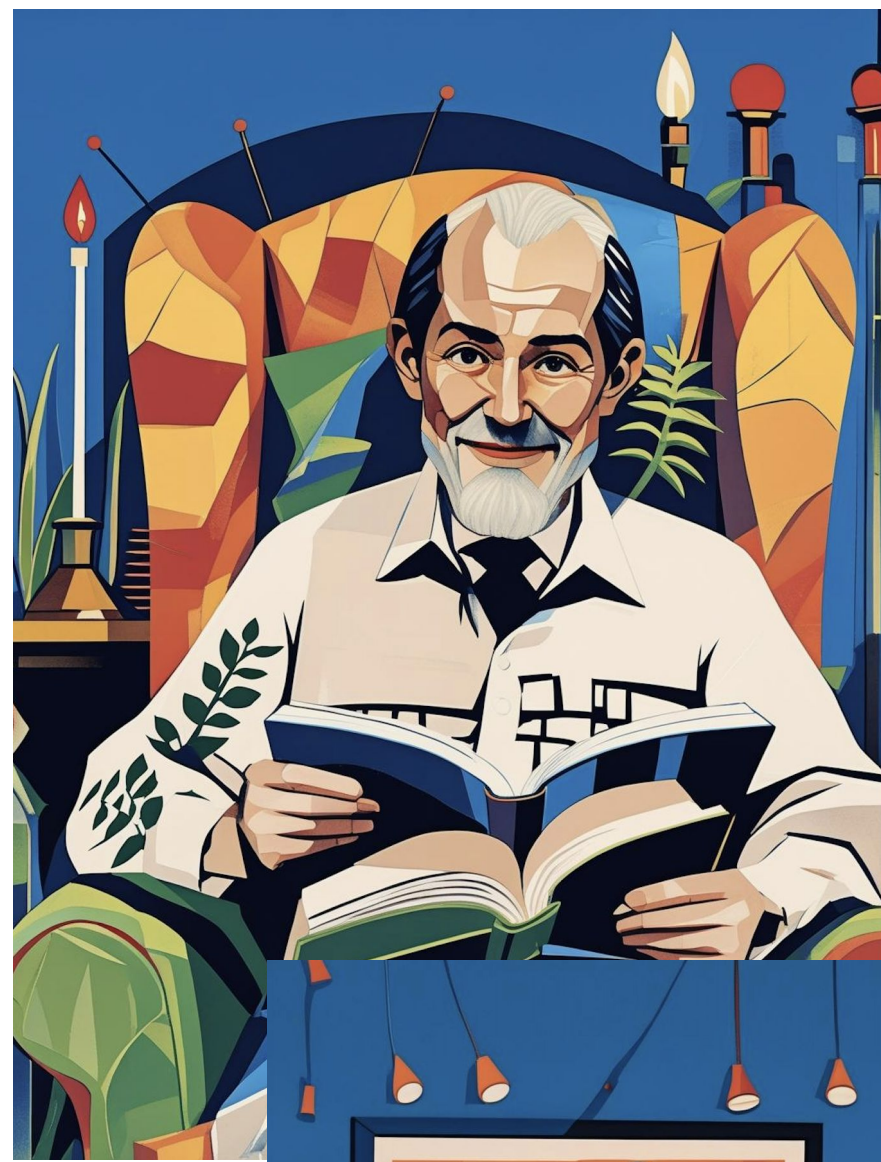
3) YOUR TRUST QUOTIENT

4) TRUST IN ACTION

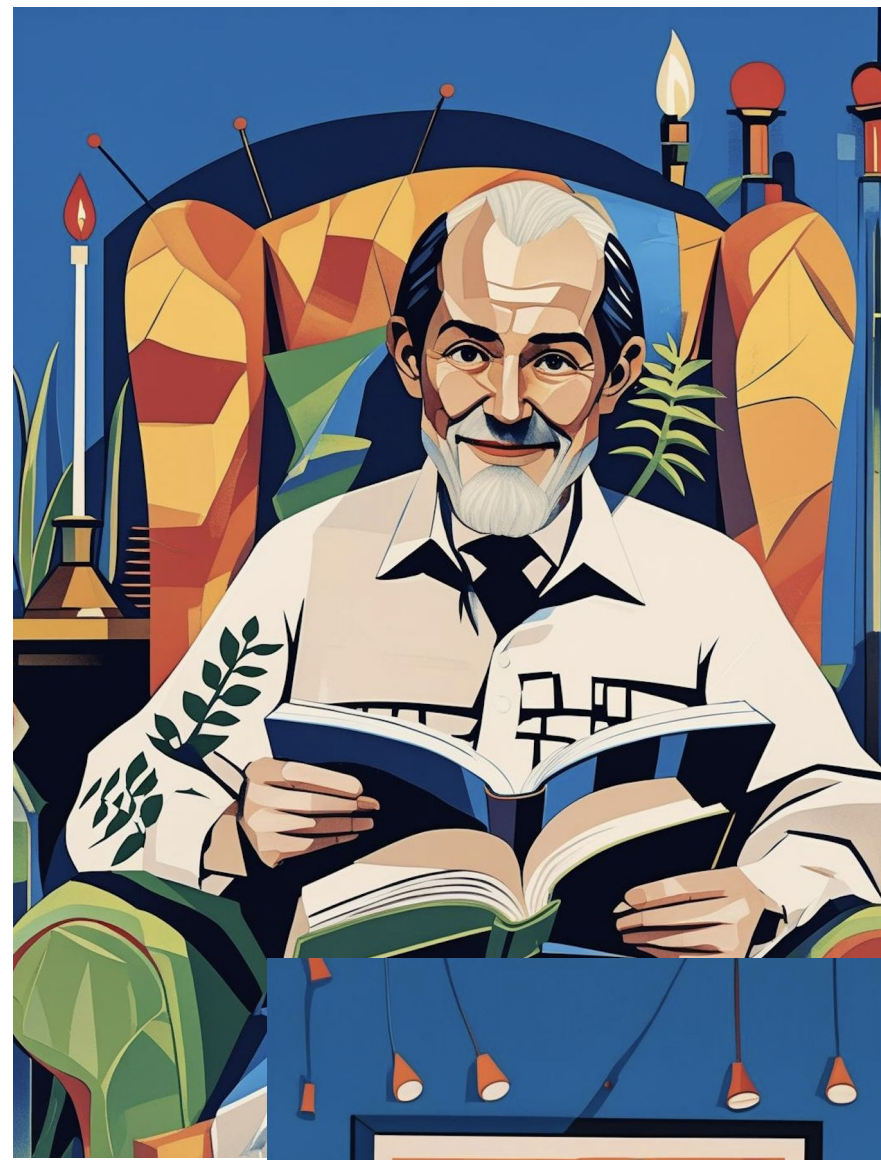


CONTEXT AND DEPENDENT ON WHAT IS IMPORTANT

WHO COMES
TO MIND
WHEN YOU
THINK OF
THE WORD
“TRUST”



**HOW DID
THIS
PERSON
EARN YOUR
TRUST?**



AGENDA:

1) DEFINING TRUST

2) BEING TRUSTWORTHY

3) YOUR TRUST QUOTIENT

4) TRUST IN ACTION



**TRUST IS A
PERSONAL,
BI-LATERAL
RELATIONSHIP**



$$\begin{array}{c} \text{TRUSTING} \\ + \\ \text{TRUSTWORTHY} \\ \hline = \text{TRUST} \end{array}$$

**BEING A TRUSTED
ADVISOR
REQUIRES BOTH
TRUSTING AND
BEING
TRUSTWORTHY**



THE TRUST EQUATION

$$\text{TRUST} = \frac{\text{C} + \text{R} + \text{I}}{\text{S}}$$

TRUSTWORTHINESS

CREDIBILITY

RELIABILITY

INTIMACY

SELF-ORIENTATION



THE TRUST EQUATION

TRUSTWORTHINESS

CREDIBILITY

RELIABILITY

INTIMACY

SELF-ORIENTATION

BLUE = RATIONAL

RED = EMOTIONAL



CREDIBILITY: RELATES TO OUR WORDS

SHOW YOU'VE DONE YOUR HOMEWORK

TAKE A POINT OF VIEW, EXPRESS PASSION

SPEAK THE TRUTH... ALWAYS

COMBINE YOUR WORDS WITH PRESENCE



**TRUTHFULNESS
CREDENTIALS**

**“I TRUST WHAT THEY SAY
ABOUT...”**

**CREDIBILITY
BUILT THROUGH
LOGIC, FACTS, AND
DEMONSTRATED
COMPETENCE - IT
APPEALS TO THE
HEAD**



RATE YOURSELF

RELIABILITY IS ABOUT OUR ACTIONS

THE ONLY TRUST COMPONENT THAT TAKES TIME...

...AND YOU CAN ACCELERATE IT!

MAKE LOTS OF SMALL PROMISES

BE ON TIME

BE CONSISTENT WITH THEIR NORMS



**DEPENDABILITY
PREDICTABILITY**

“I TRUST THEM TO...”

RELIABILITY

BASED ON

OBSERVED,

REPEATABLE

BEHAVIOR OVER TIME

- MEASURABLE AND

OBJECTIVE



RATE YOURSELF

INTIMACY IS ABOUT CREATING SAFETY

TAKE A RISK

SHARE SOMETHING PERSONAL

CALL OUT THE ELEPHANT IN THE ROOM

PAY ATTENTION TO WHEN YOU'VE BEEN GIVEN IT

**DISCRETION
EMPATHY**

“I TRUST THEM WITH...”



INTIMACY

ROOTED IN HOW YOU
MAKE OTHERS FEEL -
SAFE, UNDERSTOOD,
RESPECTED,
CONNECTED.



RATE YOURSELF

SELF - ORIENTATION

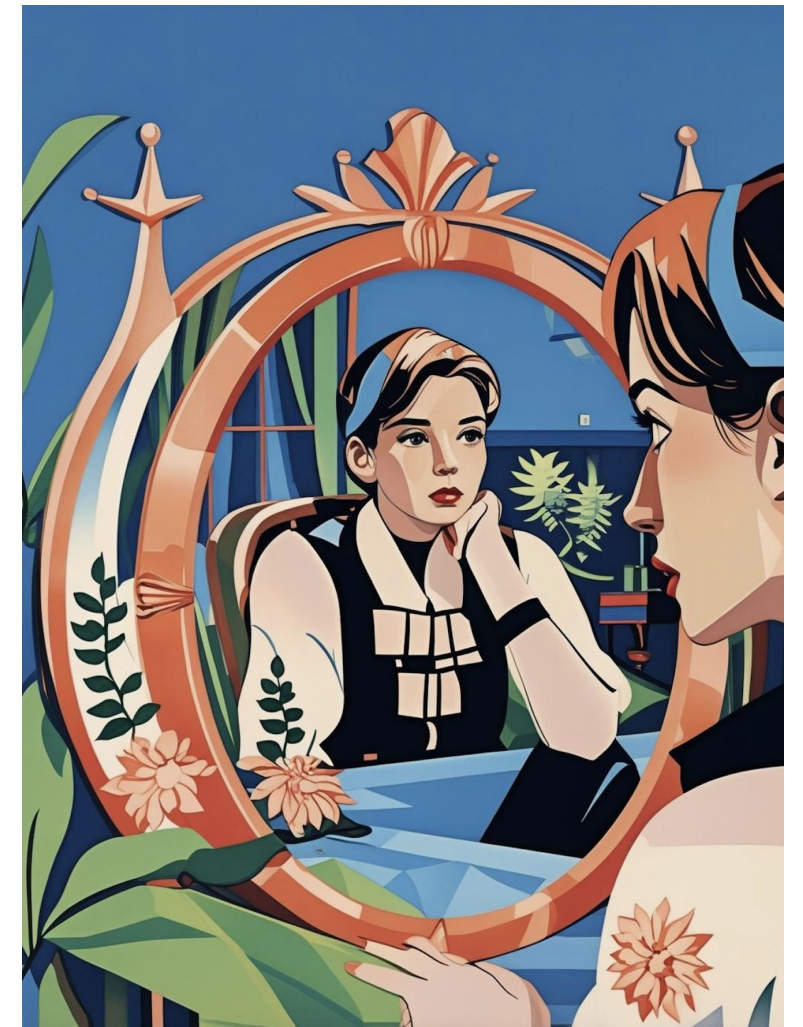
TWO KINDS:

1) SELFISH - ABOUT MOTIVES

2) SELF OBSESSED - ABOUT ATTENTION

**MOTIVES
ATTENTION**

**“I TRUST THAT THEY CARE
ABOUT...”**



HIGH SELF-ORIENTATION

TRIES TO APPEAR KNOWLEDGEABLE, EXPERIENCED, SMART, WITTY, ETC

SAYS WHAT OTHERS WANT TO HEAR AND SUGARCOAT BAD NEWS

DIFFICULTY ADMITTING MISTAKES AND FINDS OTHERS TO BLAME FOR FAILURES

A NEED TO BE RIGHT OR HAVE THE LAST WORD

LISTENS WITH AN AGENDA

JUMPS TO PROBLEM SOLVING AND OFFERING SOLUTIONS BEFORE LISTENING

LOW SELF-ORIENTATION

HONEST AND CANDID ABOUT STRENGTHS AND WEAKNESSES/ LIMITATIONS

ASKS AT THE BEGINNING OF A MEETING WHAT THE OTHER PERSON WOULD LIKE TO DISCUSS

WITH AN EXISTING OR POTENTIAL CLIENT, WILLING TO MAKE A REFERRAL TO A COMPETITOR

GIVES A DIRECT ANSWER TO A DIRECT QUESTION

FREELY GIVES OTHERS CREDIT FOR SUCCESSES

SEEKS HONEST, SPECIFIC, AND ACTIONABLE FEEDBACK

**SELF-ORIENTATION
DRIVEN BY THE
PERCEPTION OF MOTIVE -
PEOPLE SENSE WHEN
YOUR INTENT IS
SELF-SERVING OR
GENUINELY ABOUT THEM**



RATE YOURSELF

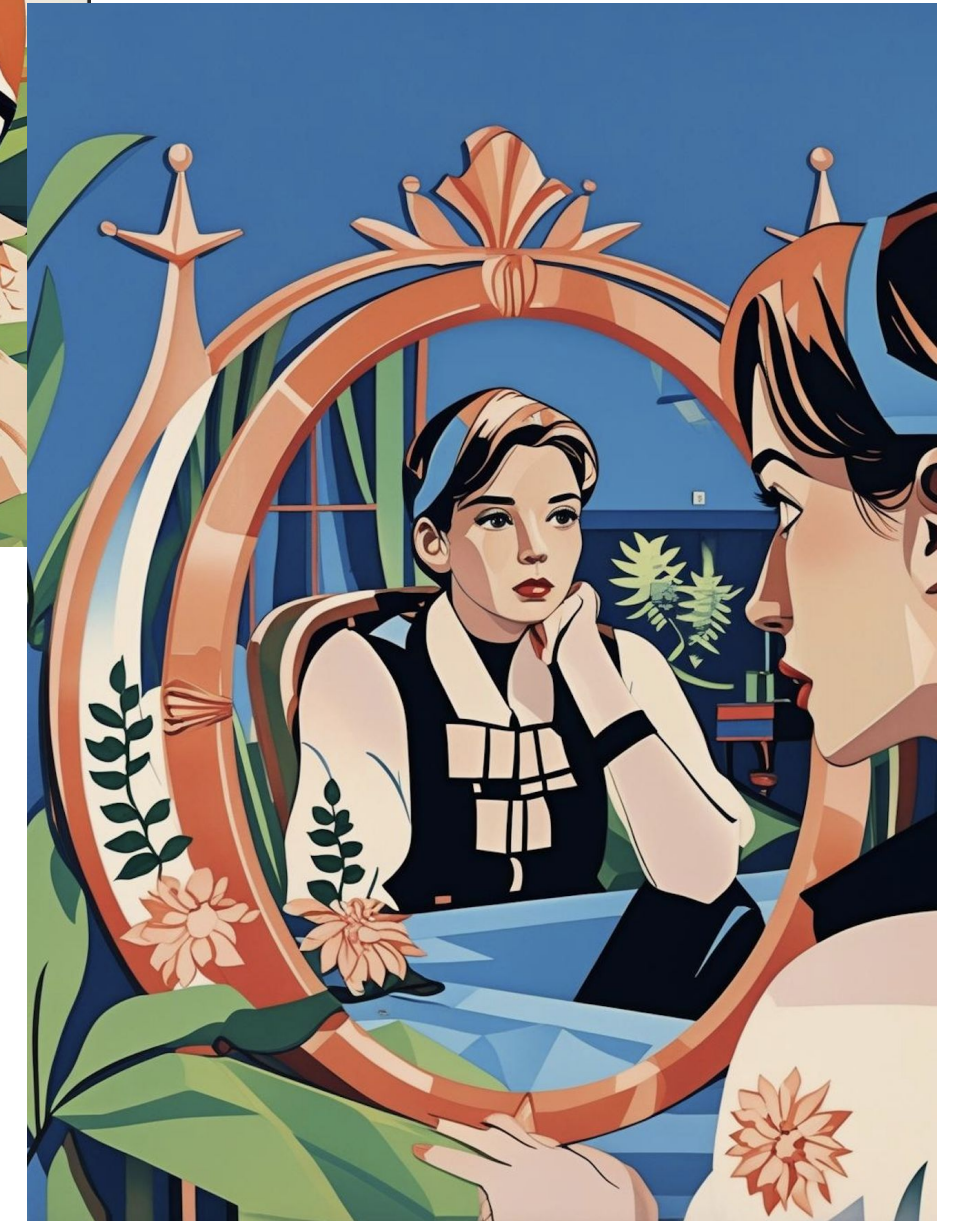
**CREDIBILITY
AND
RELIABILITY**

**BUILDS
RESPECT AND
CONFIDENCE**



**INTIMACY AND
SELF -
ORIENTATION**

**BUILDS
CONNECTION
AND SAFETY**



AGENDA:

- 1) DEFINING TRUST
- 2) BEING TRUSTWORTHY
- 3) YOUR TRUST QUOTIENT
- 4) TRUST IN ACTION



THE TRUST QUOTIENT

DEVELOPED BY CHARLES H. GREEN BASED ON THE TRUST EQUATION

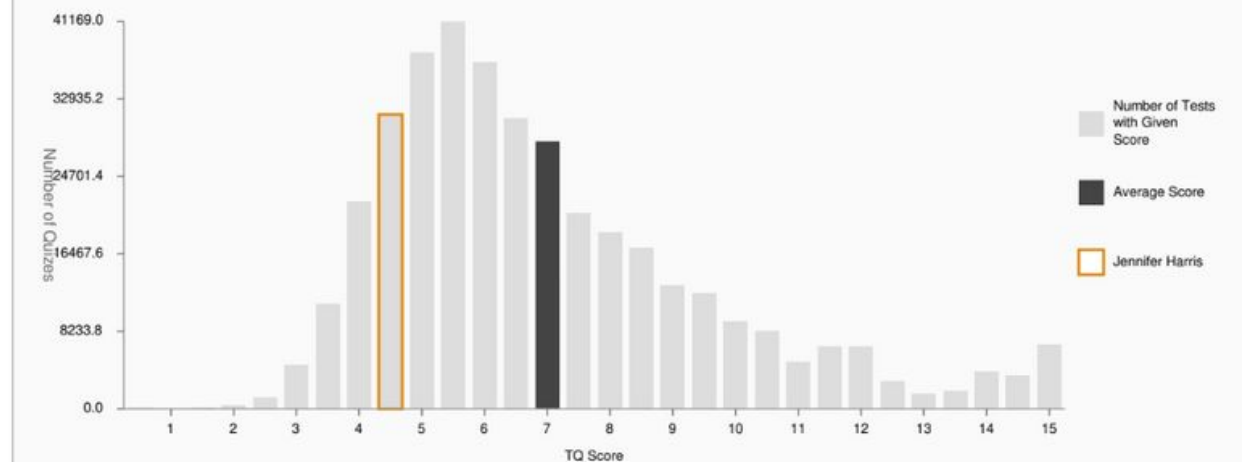
TAKEN BY OVER 250,000 PEOPLE

A QUANTITATIVE INDICATOR OF TRUSTWORTHINESS

TrustedAdvisor
ASSOCIATES LLC

Trust Quotient Personal Report for: Jennifer Harris

SECTION I: YOUR TRUST QUOTIENT IS 4.8 (SELF-SCORED)



SECTION II: YOUR COMPONENT SCORES



THE TRUST QUOTIENT

YOUR TRUST QUOTIENT IS THE TRUST EQUATION, APPLIED TO YOU

MORE IMPORTANT IS YOUR TRUST COMPONENT SCORE

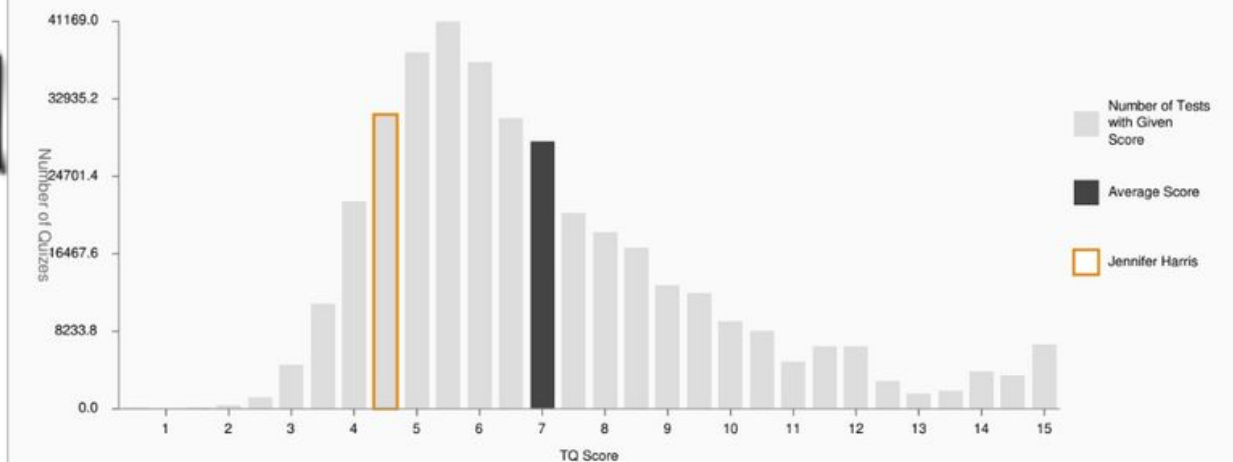
A HIGH SCORE IN SELF-ORIENTATION MEANS IT IS LOW

AIMING FOR CONSISTENCY - YOU WANT TO RAISE ALL BOATS

TrustedAdvisor
ASSOCIATES LLC

Trust Quotient Personal Report for: Jennifer Harris

SECTION I: YOUR TRUST QUOTIENT IS 4.8 (SELF-SCORED)



SECTION II: YOUR COMPONENT SCORES



MINI QUIZ

**THE FULL ASSESSMENT IS
AVAILABLE ONLINE OR THROUGH
TECH TO TRUST (ME) BUT IN THE
MEANTIME, LET'S TAKE A LITTLE
MINI ASSESSMENT...**



POP QUIZ

SCORE YOURSELF 1-5

1 - RARELY TRUE

3 - SOMETIMES TRUE

5 - ALWAYS TRUE

**DO PEOPLE SEE YOU AS
KNOWLEDGEABLE IN YOUR
FIELD?**



POP QUIZ

SCORE YOURSELF 1-5

1 - RARELY TRUE

3 - SOMETIMES TRUE

5 - ALWAYS TRUE

**DO YOU FOLLOW THROUGH ON
YOUR PROMISES CONSISTENTLY?**



POP QUIZ

SCORE YOURSELF 1-5

1 - RARELY TRUE

3 - SOMETIMES TRUE

5 - ALWAYS TRUE

**ARE YOU COMFORTABLE
SHARING PERSONAL STORIES TO
CONNECT WITH OTHERS?**



POP QUIZ

SCORE YOURSELF 1-5

1 - RARELY TRUE

3 - SOMETIMES TRUE

5 - ALWAYS TRUE

**DO YOU LISTEN TO UNDERSTAND
OR DO YOU LISTEN TO RESPOND?**



POP QUIZ

**WHICH QUESTION DID YOU
SCORE THE HIGHEST IN?**

**THIS IS HOW YOU BUILD TRUST
WITH OTHERS**



POP QUIZ

**WHICH QUESTION DID YOU
SCORE THE LOWEST IN?**

THIS IS THE BOAT TO RAISE



CREDIBILITY

Credibility exists in the domain of words. It is created through your credentials, truthfulness, and how you present yourself.

CREDIBILITY

WORDS

“I can trust what they say about...”

Credentials
Truthfulness

1. Be diligent about researching your client
2. Know about industry trends and info, business news
3. Take the initiative to expand your knowledge
4. Ask great questions
5. Write about your areas of expertise—articles, blogs, white papers
6. Express your passion for your subject
7. Host an event that brings key stakeholders together; be the moderator
8. When you present; practice, practice, practice so your delivery is relaxed
9. Use metaphors, stories, and vivid examples to share your ideas, prove your point
10. Offer your point of view when you have one
11. Share the “why” behind your point of view
12. Be articulate and thoughtful when you express yourself
13. Find ways to demonstrate your expertise; don’t just talk about it
14. Say “I don’t know” when you don’t know
15. Never ever lie
16. Report regularly on project progress/asures
17. Combine your words with presence—a firm handshake, eye contact, confident air
18. Be humble; remember there is always more to learn



RELIABILITY

RELIABILITY

ACTIONS

“I can trust them to...”

Dependability
Predictability

Reliability occurs when you prove yourself dependable and predictable over time.

- | | |
|---|---|
| 19. Set expectations up front and report on them regularly | 25. Create documents and deliverables with a consistent look and feel |
| 20. Be prepared for meetings | 26. Be rigorous about using good business practices, such as meeting agenda and notes |
| 21. Be at least on time if not early | 27. Use others' terminology and templates |
| 22. Be unbelievably responsive | 28. Establish routines in your relationships (regular meetings, emails, etc.) |
| 23. Make lots of small promises and consistently follow through | 29. Reconfirm scheduled events |
| 24. Announce changes immediately and acknowledge the impact—especially when you won't deliver as promised | 30. Only cancel if you absolutely must |
| | 31. Dress appropriately |
-



INTIMACY

Intimacy exists in the domain of *emotions* and emotional connectedness. It includes a visible demonstration of empathy, discretion, and personal risk-taking—all of which make it possible for clients to flourish in a comfortable and safe working environment.

INTIMACY

SAFETY

“I can trust them
with ...”

Discretion

Empathy

Personal Risk-Taking

32. Be relentlessly discreet; honor confidentiality
33. Address your client by name
34. Adopt a friendly tone
35. Ask something personal
36. Ask others about their feelings
37. Share something personal
38. Tell your client something you appreciate about them
39. Use colloquial language
40. Be willing to show your emotions (elation, frustration, etc.)
41. Acknowledge uncomfortable situations
42. Send a hand-written note of acknowledgment/thanks
43. Make the first move
44. Ask open-ended questions
45. Use expressive/friendly body language
46. Practice different ways of asking difficult questions or making difficult statements before you deliver them
47. Take responsibility for mistakes
48. Hold others accountable
49. Write your next proposal *with* your client
50. Be candid—Name It and Claim It!
51. Don't gossip or promote relationship “triangles”
52. Think in advance of how your client is likely to react
53. Talk more with your eyes, ears and body, and less with your mouth
54. Be empathic in all your interactions; practice Three-Level Listening
55. Celebrate success with your client
56. Extend yourself—e.g., Invite your client to meet you outside of work, share a meal
57. “Be yourself. Everyone else is already taken.”



SELF-ORIENTATION

To be other-oriented is to be consistently focused on your client's wants and needs.

OTHER-ORIENTATION

FOCUS

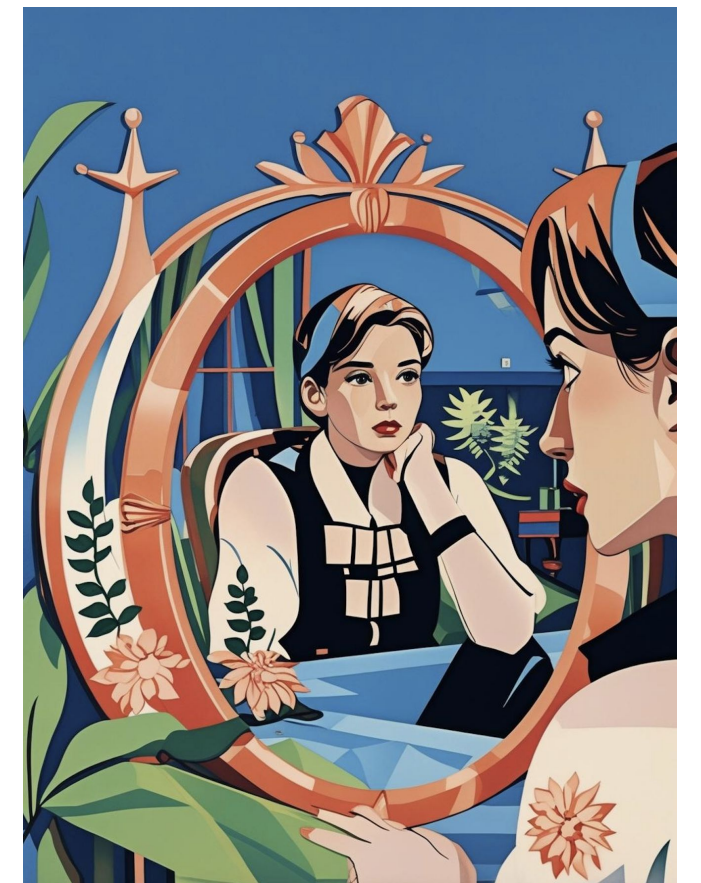
"I can trust that they care about..."

Motives
Attention

58. Find out how your client defines success and how you can help them achieve it
 59. Don't jump to problem-solving—slow yourself down by counting, taking notes, vocalizing expectations
 60. Set aside the "spin"
 61. Let go of trying to appear clever, bright, witty
 62. Be self-deprecating
 63. Confront issues as they arise—being preoccupied with them keeps your attention on your own preoccupation
 64. Answer direct questions with direct answers
 65. Give voice to your fears
 66. Know your own traps/triggers and manage them well
 67. Don't interrupt
 68. Watch a tendency to name-drop
 69. Contact your client just to find out how they are
 70. Eliminate your jargon from your conversations
 71. Put the PowerPoint deck aside
 72. Spend time in your client's shoes—imagine what it's like to be their; role play with a colleague
 73. Cultivate an attitude of curiosity—think in advance about what questions you want to ask
 74. Practice "thinking out loud" with your client
 75. Let someone else have the last word
 76. Be really honest even (especially) when it makes you look bad
 77. Give others credit for successes
 78. Skip the "blame game"
 79. Take responsibility for failed communications
 80. Deliver "early and ugly"—collaborate and iterate
 81. Be willing to make a referral to your competition
 82. Step down when your heart's no longer in it
-



**WHAT IS ONE
ACTION YOU
ARE WILLING
TO TAKE TO
BUILD TRUST
IN THIS
RELATIONSHIP**



AGENDA:

- 1) DEFINING TRUST
- 2) BEING TRUSTWORTHY
- 3) YOUR TRUST QUOTIENT
- 4) TRUST IN ACTION



LEAST TRUSTED PROFESSIONS?



LEAST TRUSTED PROFESSIONS?

PEOPLE MAY SAY:

“I KNOW SHE’S BRILLIANT - I JUST DON’T FEEL LIKE SHE’S REALLY LISTENING TO ME”

“HE IS GREAT IN COURT BUT NOT EASY TO CONFIDE IN”



LEAST TRUSTED PROFESSIONS?

LAWYERS

CREDIBILITY - VERY HIGH

RELIABILITY - HIGH

INTIMACY - MODERATE TO LOW

SELF - ORIENTATION - MODERATE TO HIGH



MOST TRUSTED PROFESSIONS?



MOST TRUSTED PROFESSIONS?

PEOPLE MAY SAY:

“SHE MADE ME FEEL CALM WHEN EVERYTHING WAS FALLING APART”

“HE ACTUALLY LISTENED - NOT JUST TO MY WORDS, BUT TO ME AS A PERSON”



MOST TRUSTED PROFESSIONS?

NURSES

CREDIBILITY - MODERATE

RELIABILITY - HIGH

INTIMACY - HIGH

SELF - ORIENTATION - IDEALLY LOW



COMMON PROFESSIONS

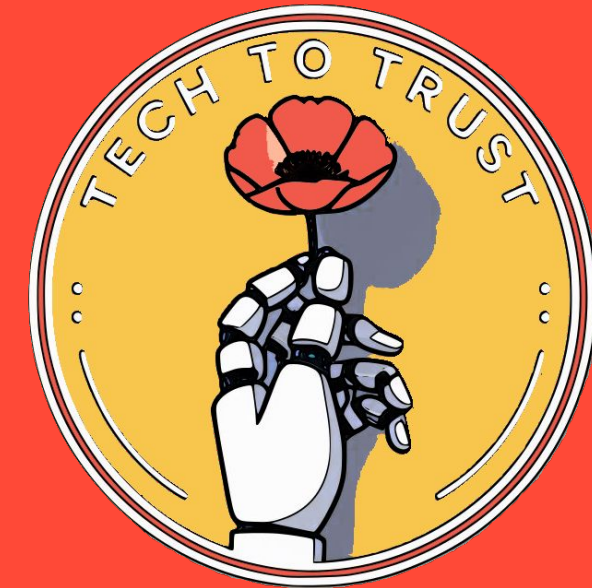
WHICH PROFESSIONS DO YOU WORK WITH?

WHAT CAN YOU LEARN ABOUT HOW THEY EARN AND GIVE TRUST AS A WHOLE?



AGENDA:

- 1) DEFINING TRUST
- 2) BEING TRUSTWORTHY
- 3) YOUR TRUST QUOTIENT
- 4) TRUST IN ACTION
- 5) QUESTIONS?



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