

# The Trusted Advisor - Entdecke die Gleichung für Vertrauen

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Online Event, 23. Februar 2021

**Hamburg**@work 

**Das Netzwerk für eine neue Welt**

DigitalCluster.Hamburg

“I believe we can make IBM **the most trusted technology partner of the 21st century.** For this to happen, we have to ensure that IBM continues to innovate and lead in the transformational journeys our clients are on.”

Arvind Krishna,  
Chairman and Chief Executive Officer of IBM  
April 6, 2020 on 



# Agenda

1 – Anatomy of Trust

2 – The Trust Model

3 – Trust Conversation

4 – Wrap Up

# Agenda

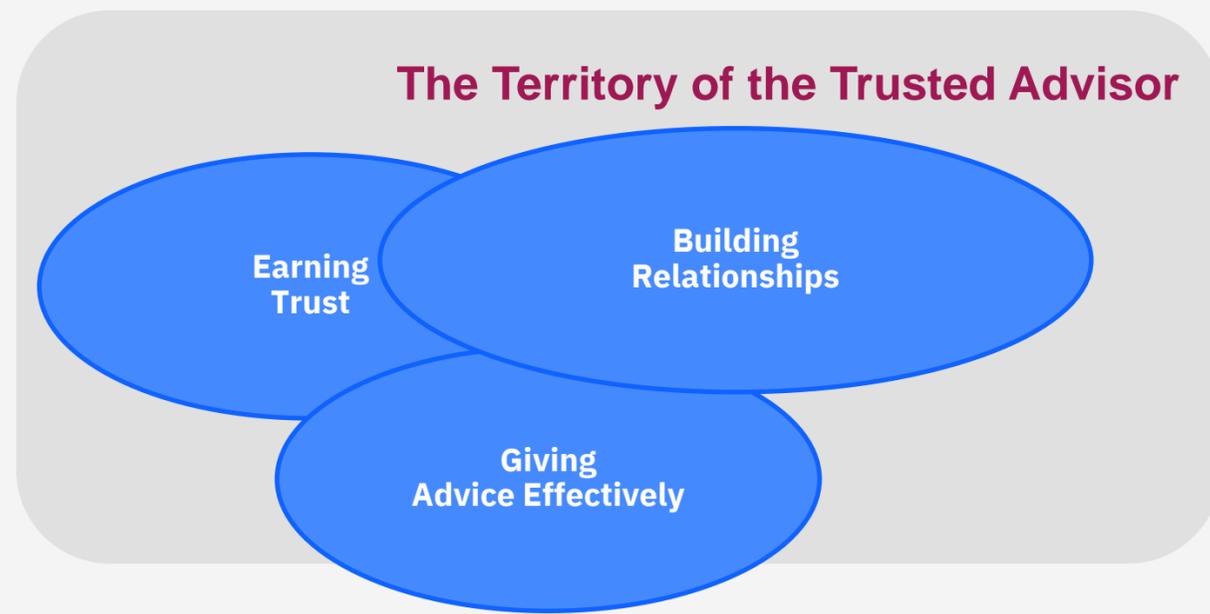
1 – Anatomy of Trust

2 – The Trust Model

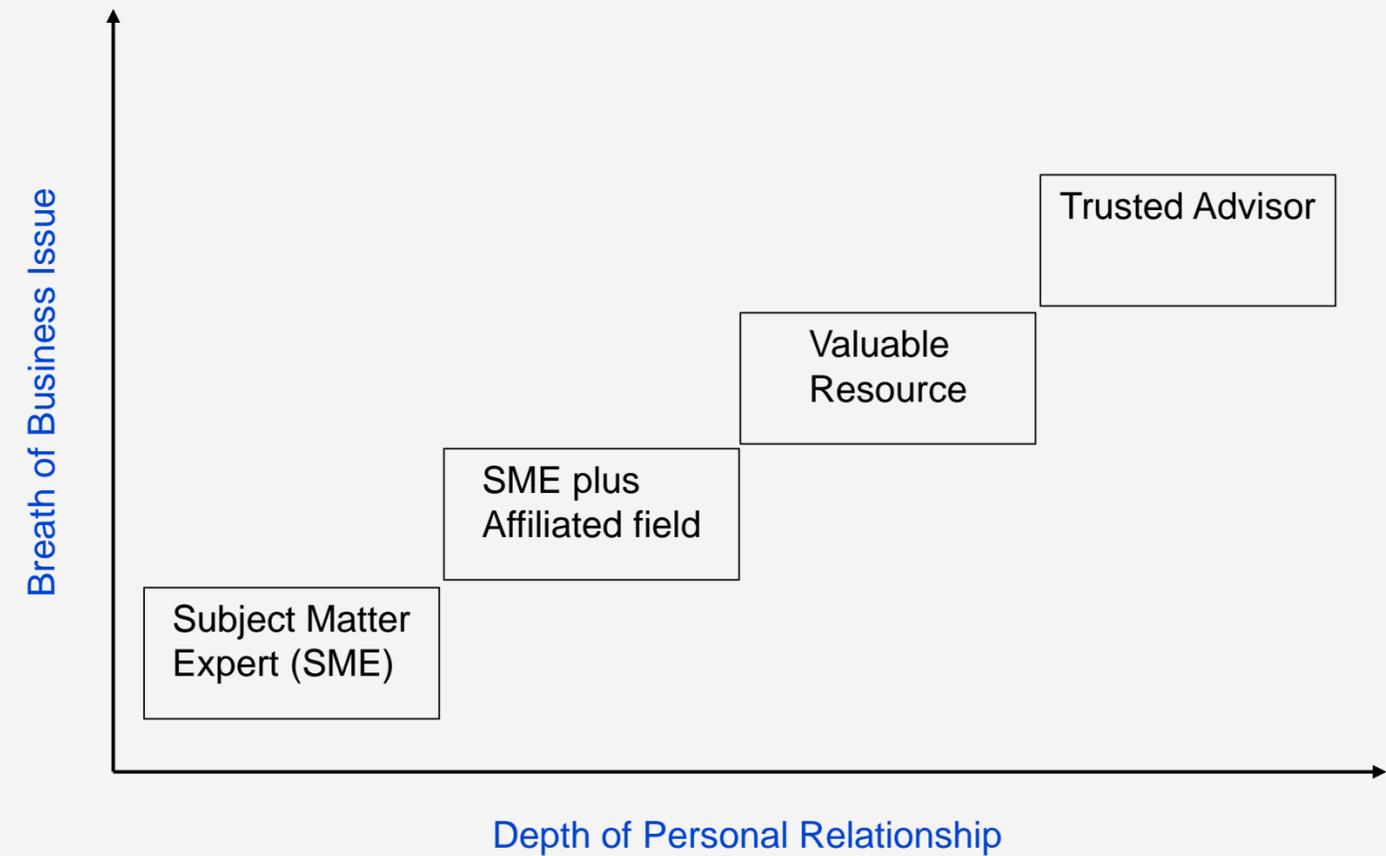
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# What is a Trusted Advisor?



## The Evolution of a Client-Advisor Relationship



Source: Maister, David H./ Green, Charles H./ Galford, Robert M. (2000): The Trusted Advisor, New York: First Free Press paperback edition 2004, Part One & page 7

**TRUSTWORTHINESS  
IS EARNED.**

**TRUST  
IS GIVEN.**

# What quality/characteristic might you recognize in a client that would give you a clue they are trustworthy?



# Trust pre-conditions

Adapted from Building Trust: How To Get It! How To Keep It! | Hyer Bracey

1

## TRANSPARENCY

- The first quality you need to begin building a trust-based relationships with your client.
- **Primarily has to do with revealing your emotions.**
- With transparency, you make everything visible that needs to be visible under the circumstances.

EMOTIONAL

2

## OPENNESS

- **Primarily has to do with sharing your thoughts and intentions.**
- Your client has no need to ask questions because everything he/she needs to know you have made clear.

INTELLECTUAL

3

## VULNERABILITY

- **Primarily has to do with the practical consequences for you if your client does not comply with your request.**
- You have to articulate the negative consequence to you if your client fails to honor your request.

INTENTIONAL

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**“Value is tangible,  
intangible,  
institutional and  
personal. You must  
deliver all of these—in a  
mixture tailored to  
your specific client—  
to build a trusted  
partnership.”**

**Andrew Sobel  
Leading trust authority**



Photos | LinkedIn

# How trustworthy are you? Self-Assessment online

Link to Trust Self-Assessment:

<https://trustsuite.trustedadvisor.com/>

- 15 Minuten -

# The Trust Equation

David Meister

The Trusted Advisor

**Trustworthiness =**

**Credibility + Reliability + Intimacy**

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**Self-orientation**

# The Trust Equation

David Meister

The Trusted Advisor

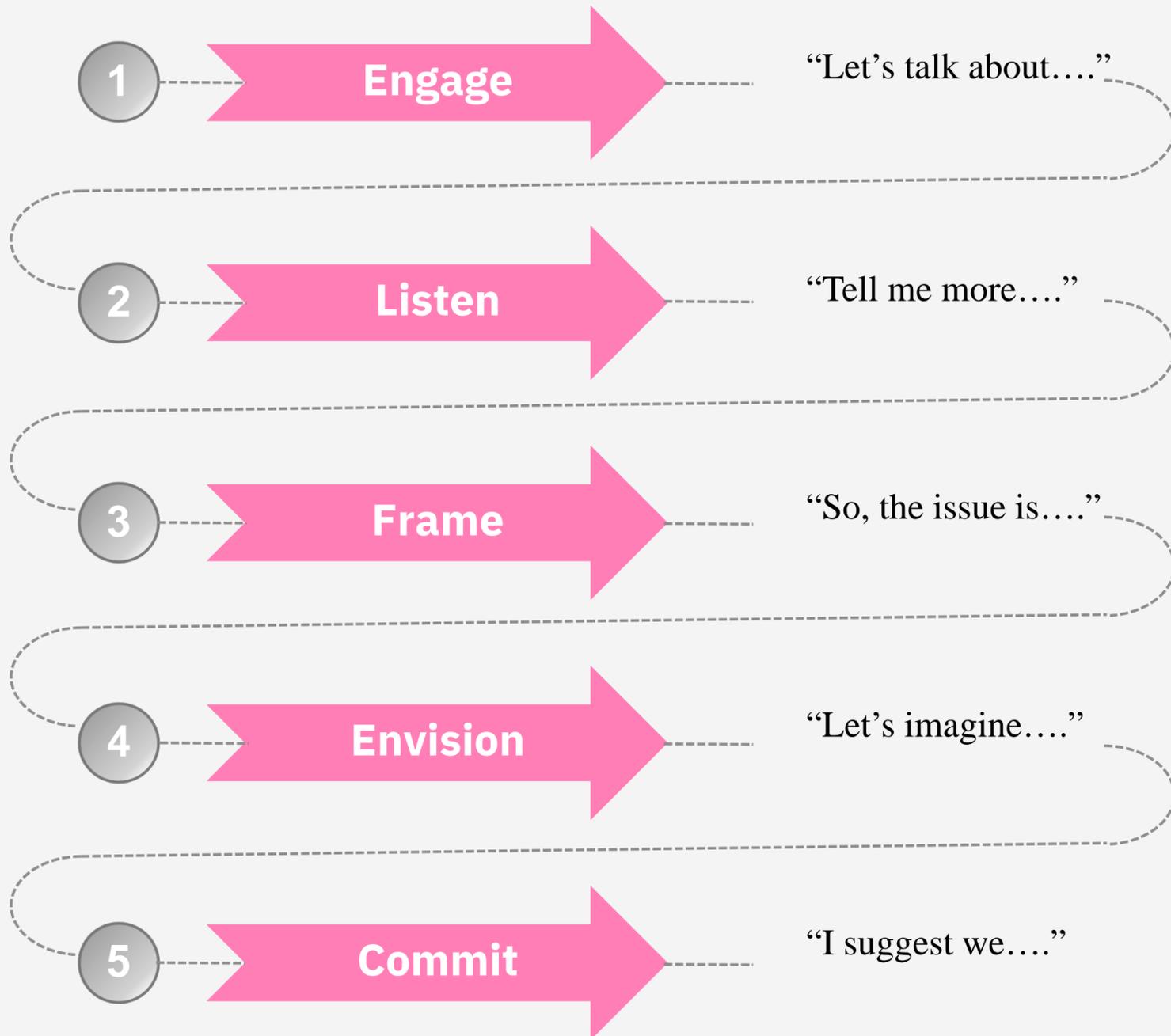
**Trustworthiness =**

**Credibility + Reliability + Intimacy**

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**Self-orientation**

# The Trust Creation Process (ELFEC)



When you are transparent, your client can quickly de-code your emotional state.



# The Trust Principles

- 1 Focus on the Other
- 2 Collaborative Approach
- 3 Medium- to Long-Term Relationship Perspective
- 4 Habit of being Transparent

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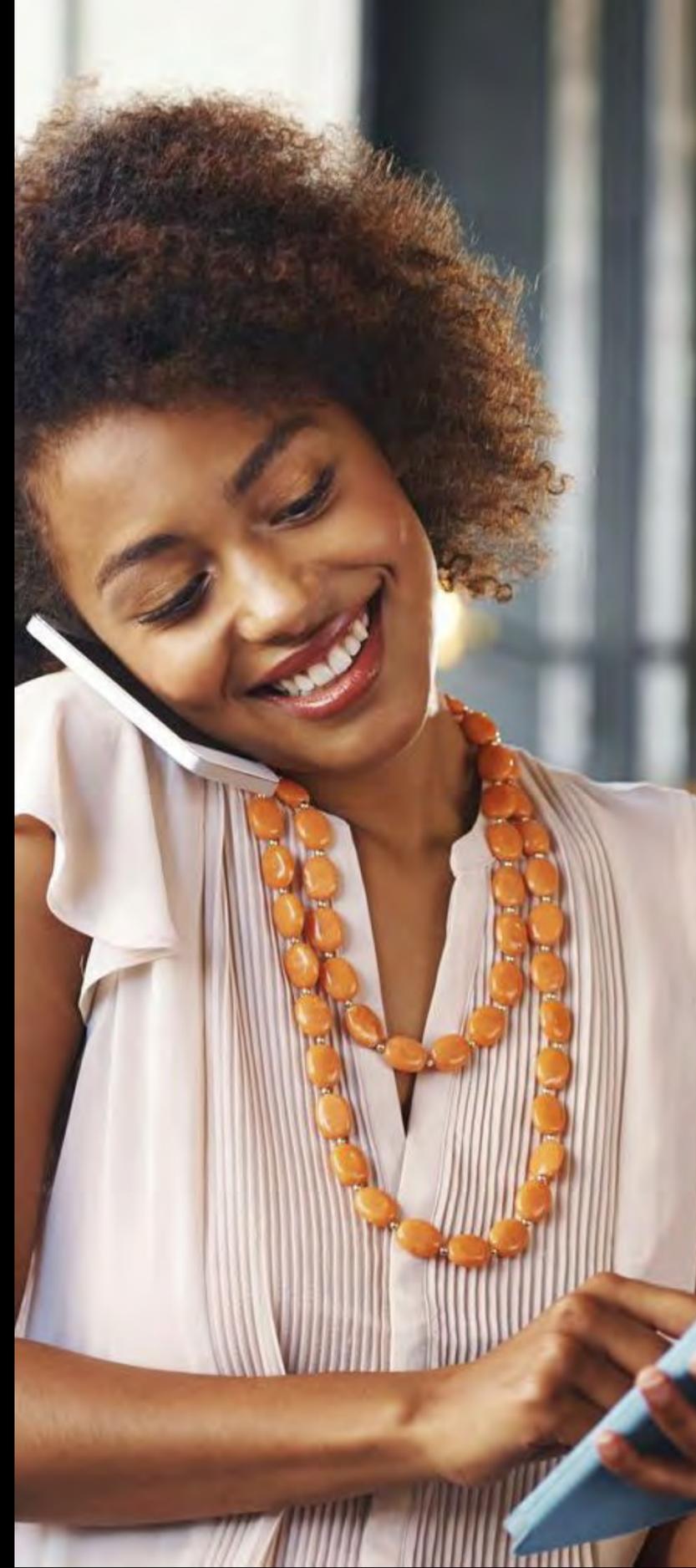
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# TRUST SKILLS

Adapted from The Trusted Advisors Fieldbook | Charles H. Green

- LISTEN
- PARTNER
- IMPROVISE
- RISK
- KNOW YOURSELF



# Reasons for Perceived Risk

Source: Maister, David H./ Green, Charles H./ Galford, Robert M. (2000): The Trusted Advisor, New York: First Free Press paperback edition 2004, Part Three & page 145

<ul style="list-style-type: none"> <li>• Perceived Risk to Credibility</li> </ul>	<p style="text-align: center;"><b>“You Can’t”</b></p> <p>Hypothesize</p> <p>Say you don’t know</p> <p>Focus on the problem statement</p>	<p style="text-align: center;"><b>“Because the Client Wants”</b></p> <p>An Answer</p> <p>Confidence</p> <p>Expertise</p>
<ul style="list-style-type: none"> <li>• Perceived Risk to Intimacy</li> </ul>	<p style="text-align: center;"><b>“You Can’t”</b></p> <p>Stay with listening too long before moving to action</p> <p>Get too personal</p> <p>Talk about emotions</p> <p>Go off-agenda</p> <p>Point out difficult situations</p>	<p style="text-align: center;"><b>“Because the Client Wants”</b></p> <p>Action</p> <p>A “professional” relationship</p> <p>Just the facts</p> <p>Progress</p> <p>To no be embarrassed</p>

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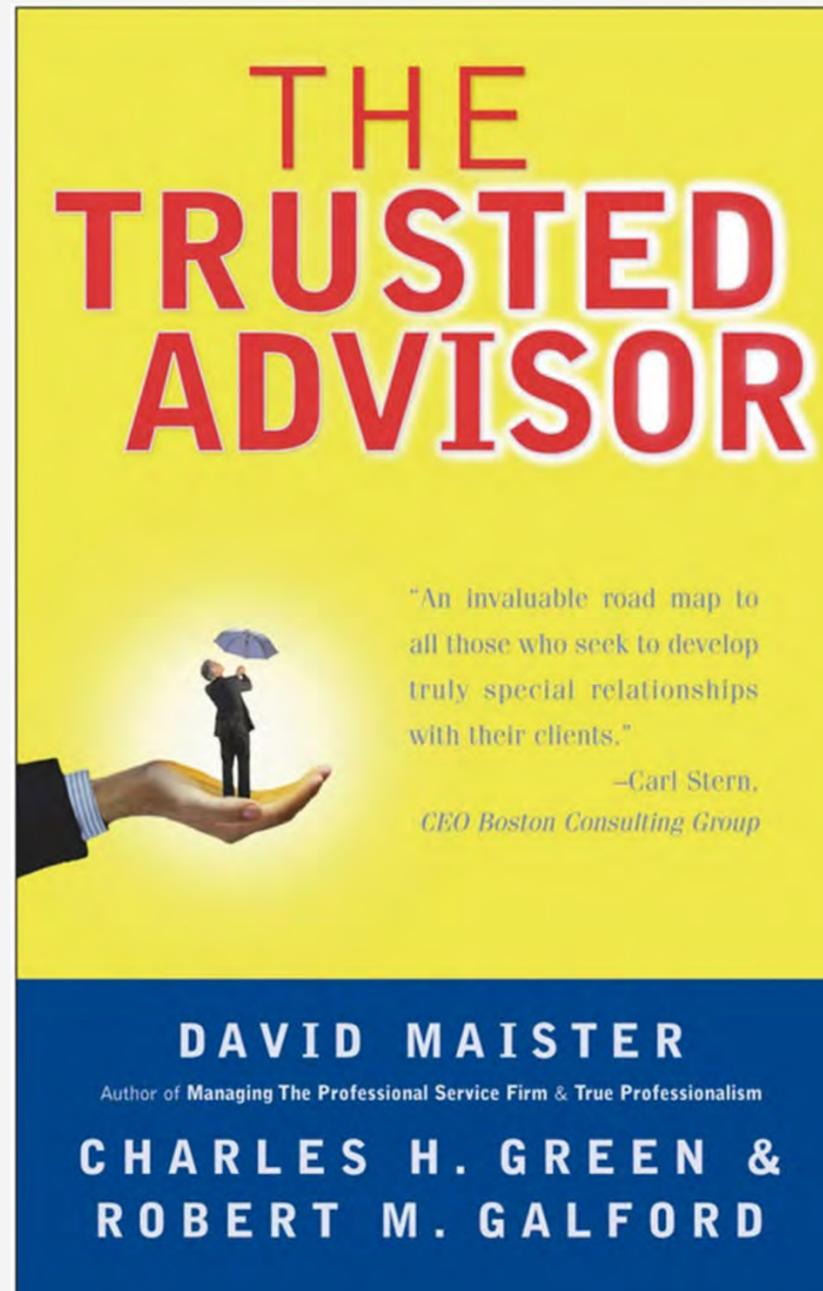
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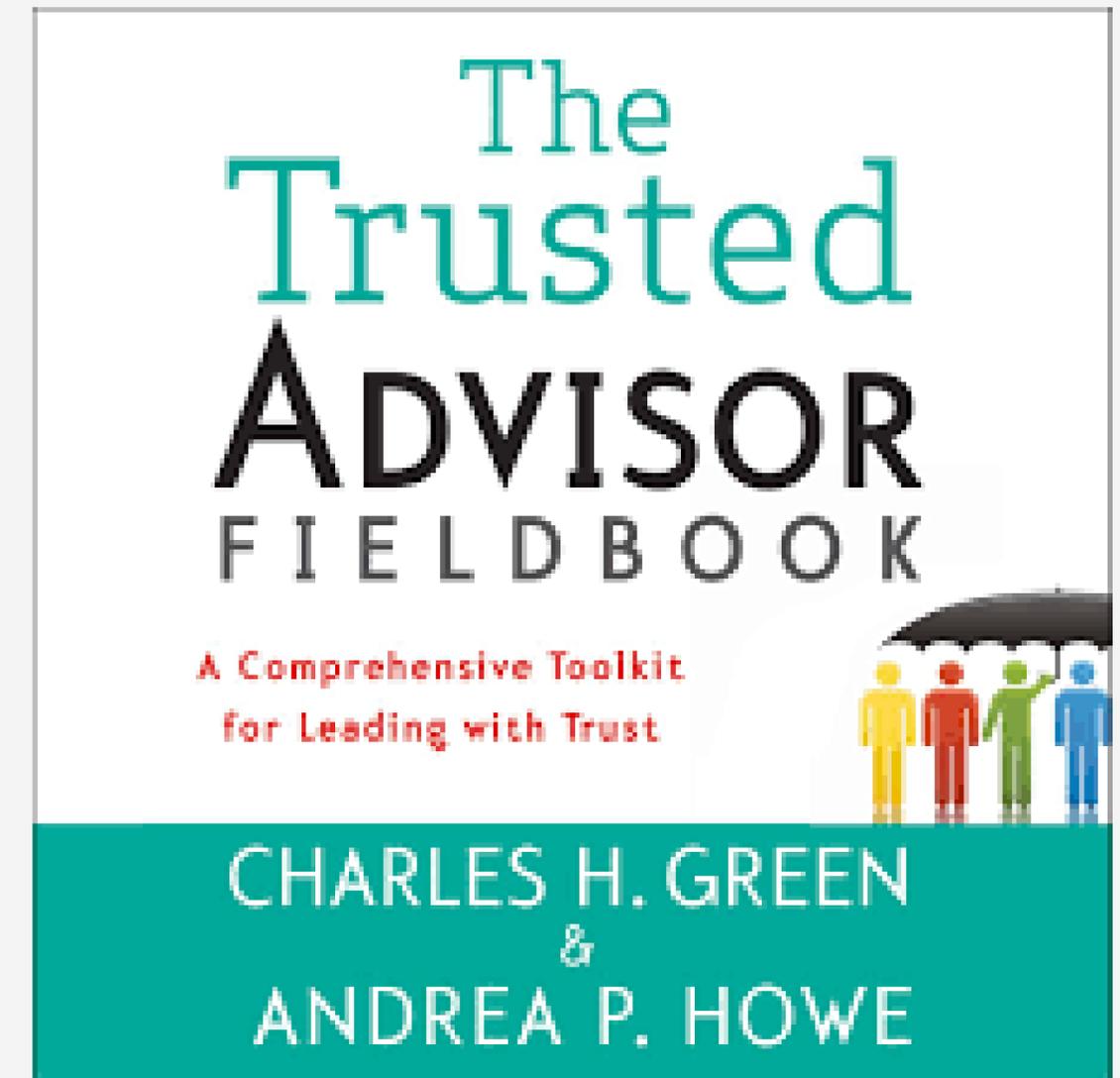
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# Referenced Literature

The Trusted Advisor



The Trusted Advisor Fieldbook



# Clients work with people they like!

- Focus on the client / individual rather than themselves
- Focus on the problem definition & resolution
- Motivated by internalized drive to do “the next right thing”
- Seeks out client-contact experiences and takes personal risks
- Selling / Servicing is the name of helping clients with *their* issues
- While technical mastery is “cost of entry”, the human element drives the engagement



# THANK YOU

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