



## 82 WAYS TO BUILD CLIENT TRUST

Using the [Trust Equation](#) from the books [The Trusted Advisor](#) and [The Trusted Advisor Fieldbook](#), discover 82 specific ways to increase the level of trust in your client relationships. Which one will you put into practice today?

$$T = \frac{C + R + I}{S}$$

C + R + I  
Credibility Reliability Intimacy  
S  
Self-orientation

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 she says 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/measures
17. Combine your words with presence—a firm handshake, eye contact, confident air
18. Be humble; remember there is always more to learn

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

### RELIABILITY

#### ACTIONS

“I can trust him to...”

Dependability  
Predictability

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

## 82 WAYS TO BUILD CLIENT TRUST (CONT.)

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 her 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 him/her
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.”

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

### OTHER-ORIENTATION

#### FOCUS

“I can trust that she cares about...”

Motives

Attention

58. Find out how your project team 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. Call your client just to find out how he/she is
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 him/her; 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