



PATHWAYS

Focus:

The Leader-Trusted Advisor Relationship

In our last issue, we discussed the added value an organization's leaders attribute to performers and suppliers when they view them as "trusted advisors." "Trusted advisor" is not a job title. It is a business relationship, between leaders and those who support them, which builds over time through dedicated effort on everyone's part.

While all performers and suppliers deliver value, "trusted advisors" are perceived as delivering more value. This is because in addition to fulfilling their normal commitments, they also develop and maintain special, consultative business relationships with leaders of the organizations they support.

We also described some ways an organization's leaders can create a business climate that both encourages performers and suppliers to grow into a trusted advisor role and reinforces those efforts.

Trusted advisors acquire leader trust and confidence by:

- Helping anticipate and identify business trends
- Supporting leaders as they seek to achieve greater profitability, growth, or similar business objectives for their organization

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AT ISSUE:

Becoming a Trusted Advisor

While it is incumbent upon an organization's leaders to create and support a "trusted advisor" business environment, as a performer or supplier you have responsibilities of your own. Regardless whether your role is primarily that of a performer or a supplier (actually, you probably act from time to time in both roles), you need to evaluate your present situation and performance, and then take action to grow into trusted advisor status.

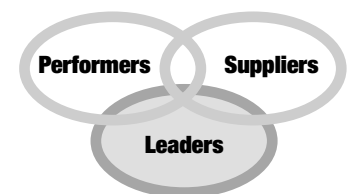
The Benefit of Becoming a Trusted Advisor

If your current work performance meets job requirements, you clearly are delivering value to the organization. But if you are able to exceed minimal requirements and build a strong business relationship with the organization's leaders, the rewards will be far greater and will truly be worth the effort. You will be valued, not just for your day-to-day efforts, but with the trust that leaders place in your unique expertise and support. If you look around your organization and industry, you will probably notice that those who outperform tend to grow and move ahead into areas of greater trust and responsibility.

Performance Attitudes and Mind-set

A major first step in becoming a trusted advisor of organizational leaders is to examine your performance work attitudes and mind-set. The table on page 2 compares the attitudes of a competent performer or supplier ("ticket of admission level") with those of a trusted advisor. Ask yourself which column currently better represents how you perform within your organization.

Common Job Roles



Performers
information workers,
product/service development
teams, sales staff, other
organizational support groups

Suppliers
vendors, consultants,
channel partners

Leaders
CxOs, project managers,
department managers,
anyone else in the organization
with a leadership role

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The attitudes of a performer or supplier in the "Ticket of Admission" column are certainly positive and of value to organizational leaders. However, these attitudes tend to be focused only on immediate tasks and responsibilities. In comparison, attitudes in the "Trusted Advisor"

column, when added to the ones in the first column, are typical of a true business advisor—one who is focused on the "big organizational picture" as well as on immediate responsibilities. Trusted advisors work to ensure that their own tactics support the vision and strategies of organizational leaders.

"Ticket of Admission" Attitudes	Trusted Advisor Attitudes
I attend and participate in organization-sponsored training and orientation sessions.	I accept personal responsibility to grow my skills, knowledge, and experience.
I deliver on my commitments—on-time, usually on-budget, and with as high quality as the schedule permits.	I look for ways to shorten delivery cycles, improve quality, and anticipate changing needs.
I keep my immediate leaders informed of potential problems and possible schedule slips.	I anticipate problems before they happen, assess the risks, and suggest solutions to mitigate their effects.
I remain open to change.	I try to align my work efforts to support the vision and strategy of organizational leaders.
I cooperate with other team members to meet requirements.	I support organizational leaders even when their needs fall outside of my immediate assignment and/or contractual/ employment agreements.
I protect the "turf" of my immediate leader, limiting to a minimum my communications with vendors and other groups in the organization.	I'm sensitive to and responsive to situations where others outside my own group have a "need-to-know" about important developments and changes.
	At the same time, I can be trusted with sensitive information.

It's a Matter of Actions, not Words

Further, the attitudes described in the Trusted Advisor column lead to, and are manifested in actions—actions which reflect personal development efforts and proactive performance. There are many actions you can take to grow into a trusted advisor relationship with the organizational leaders. You can:

- Prepare yourself to expand your role
- Earn the right to be a trusted advisor
- Expand your role as a trusted advisor

Let's examine some ways you can accomplish each of these development efforts.

1. Preparing Yourself to Expand Your Role

Before you can expect to become a trusted advisor, you need to prepare yourself. The following checklist contains some ideas of ways to realize personal growth.

Develop your Knowledge and Skills

- Develop expertise – strive to become and remain a company expert, an industry expert, and an expert about the competition.
- Take advantage of all available personal development opportunities.
- Develop your own resource networks.

- Grow your industry expertise:
 - Participate actively in professional organizations.
 - Read professional business and professional books and journals—in your specialty areas and in all the business specialties you support.
- Create a personal "action plan" for professional development and networking.
 - Identify what actions you plan to carry out, whom you need to help you achieve your plan, and a timeline to complete each activity.
- Implement the plan, monitor your results, and update the plan as often as needed to achieve your goals.

2. Earning the Right to be a Trusted Advisor

Becoming a trusted advisor doesn't just happen over time. You have to earn the right. It helps to begin by broadening your business perspective and by actively seeking ways you can help improve organizational operations and growth. The following two checklists offer some ideas:

Broaden your Business Perspective

- Accept and proactively support dynamic changes in the organization, industry, and general economy.
- Seek to be a person who demonstrates an understanding of the "big picture" view. Align your efforts to help accomplish the defined strategic direction of the organization.

Contribute to Organizational Operations and Growth

- Watch for ways to enhance the performance of the group(s) you support.
- Offer constructive suggestions to improve organizational focus, direction, and plans.
- Offer to be a coach and/or mentor when appropriate.

3. Expanding your Role

The trusted advisor role is one of constant personal growth. There are many steps you can take to enhance your support of organizational leaders as they come to value your contributions as a trusted advisor. You can:

- Contribute to business planning
- Expand business relationships.

- Contribute to the growth of others in the organization.

The following three checklists suggest some ways to accomplish these role-expansion objectives:

Contribute to Business Planning

- Watch for opportunities to participate in strategic and tactical planning sessions.
 - Help leaders answer the questions, "Where are we going?" "How can we get there?"
- Help leaders identify the risks and benefits of various planning alternatives. Contribute data to, and participate in, budgeting sessions:
 - Bottom-up: Mid-year planning
 - Top-down: Best use of limited resources
- Strive to the development of plans that lead to business results which will be recognized at higher levels in the organization.

Expand Your Business Relationships

- Draw upon existing interactions with organizational leaders; leverage your day-to-day relationships with them.
- Constantly seek to build business relationships with leaders throughout the organization.
- Watch for opportunities to expand your support services within the client's organization.
 - Touch base with managers throughout the organization frequently.
- Make friendly "status calls" to keep leaders informed of the progress of the projects you support.
- Support leaders in their management tasks:
 - Offer to review and constructively critique draft presentations.
- Conduct informal coaching sessions to help leaders prepare for presentations.

Contribute to the Growth of Other Members of the Organization

- Participate in staff development sessions.
- Accept requests to assist leaders in the conduct of staff development opportunities.
- Offer to review and constructively critique draft organizational/staff development materials.

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- Helping increase productivity
- Providing better support products and services.

In this issue we address some ways performers and suppliers can earn the right to become trusted advisors within the organizations they serve.



John C. Wills
President/CEO

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Naturally, you can't be expected to perform all these activities for all the leaders of the organization all the time. But you will find that, as leaders become aware of your competencies, you will increasingly be called upon to

advise and assist them. And have no doubt—the trusted advisor relationships you earn will be rewarded.



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