

# It's All About Building Trust!

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## Sometimes "Hard Lessons" are The Best Teacher

April 17th, 2004 will be a day I will long remember. After spending close to four months responding to the clients RFP for systems integration work, I received a phone call from the executive sponsor informing me that they had awarded the consulting work to another firm.

It's funny when people have to deliver bad news how short their conversations are. "But wait I responded before he hung up, can you give me some feedback as to why we didn't win the work?" Sure, he said. "You all had the best services bundle, the most experience in our industry, best economic model, highly experienced talent, but you know we just liked that other group better!" What on earth do you mean I responded, how could that be the deciding factor given everything else you mentioned?" "We just seem to like them more, they bonded better with our team, had better chemistry with us and we felt they put our best interest first and we trusted them more!" So at the end of the day, I learned a very important lesson about working with clients, *It's all about building trust* and acting like a trusted advisor that really makes a difference.

For the product company with a professional services organization staffed with technical specialists, field service professionals, consultants, engineers and various other technical experts, how can you make the transition from technical specialist to trusted advisor in all your interactions with clients?

### ***Six skills are required:***

#### **# 1. You Have to Think Strategic**

A trusted advisor understands the market forces that your client is faced with, and has information about competition and the critical business issues that are on the minds of executives. They also have in their back pocket several best practices, and they can describe lessons learned from similar engagements.

Every client has an interest in best practices since few have the time and energy to capture this kind of information even after their own successful project work.

Supply your technical specialists with industry data, best practices, and how these two factors can be applied in the client organization. Want to see a

client's eyes light up? Ask if it's okay to share a few best practices. This will help establish your credibility an important factor in establishing a trusting relationship.

## **#2. You Have to Understand the Fundamentals of Change Management and How to Manage it.**

Frequently, a technical specialist has the perfect solution to a client's problem but cannot gather the internal support to implement it. Why is that? Issues such as resistance, change history, lack of good communications about the change, and sponsorship, as well as not talking to the client about how people in the company will be impacted by the change, can derail the entire solution and services set.

In order for technical specialists to build trust into their client relationships, knowledge about how people and organizations change is an essential ingredient. Clients like to know that you are smart enough to have thought about these issues even if they haven't. Hey, they are people too! Being knowledgeable about change management fundamentals, principles and processes will help foster the belief that you can be of great help in managing the change, not in having the change manage the client and their organization.

## **#3. You Need Technical Expertise Coupled with Good Communications Skills.**

Clients respect technical specialist's core competencies. That's one of reasons they hired you. But possessing technical skills is only half the battle. You also need to be able to communicate technical concepts in a manner that is user friendly and doesn't make the client feel like you are talking at them. In order to make that successful transition, technical specialists need skills in how to present information. How to manage group dynamics as well as how to utilize creative graphics, analogies, and stories to get their points across.

I recently attended a feedback session related to a "voice of the customer" assignment with a client and the presenter showed slide after slide of statistical data that even a MIT graduate couldn't comprehend. At the end of the presentation, my client asked the question, which by the way was never fully answered, "So what's the point in all this?"

Great information poorly presented and understood. Net result, a loss of trust and credibility on the part of the technical expert.

## **#4. You Have to Project a Business Acumen Presence**

It's really not that difficult for a technical specialist to learn some basic business fundamentals. I know, your thinking, "Why would I want to bother with

teaching them things like how to read a corporate balance sheet, a P&L financials statement, service utilization metrics, understanding concepts like ROI, ROE, ROA, margin, cost of sales and how to calculate value?"

The answer is because a client likes to feel that they are dealing with a business person first who also understands their services enterprise. At the end of the day they have to make business decisions that affect the top and bottom line, so your understanding of their business issues enhances communications and adds to the trust formula.

Wouldn't it be great if your technical specialist could be more than dangerous on these business fundamentals? I'm not suggesting that everyone go back to school and obtain an MBA from Harvard, but a technical specialist that understands the client's organization from a business perspective will be a more confident communicative and better technical specialist with strong business acumen and presence.

I once was in the lobby of a client organization where I overheard a technical specialist talking to a manager who had responsibility for field operations. The client asked the specialist if he had read the article in the Wall Street Journal about the new remote monitoring and tracking system that was emerging and would be the wave of the future for his business. The specialist, "answered, no they don't allow us to read anything but technical journals!" The client then walked away shaking his head.

Business acumen can be obtained through exposing your professionals and service field specialists to areas that are important to business. These can be internal reports, business journals, attending conferences out of their normal areas of expertise, and even attending internal meetings where business not just technical topics are being discussed. A little cross-fertilization can go along way in building business acumen, and is also a strong step in being seen as a strategic business advisor with clients.

#### **#5. You Need to be Able to Talk to Clients About Value**

What is value? There are many answers, but most of them typically fall into two buckets, benefits and costs. Benefits like, lowered costs, improved quality, improved output and improved image always have to be stronger than factors such as costs, time, money and hassle.

Here is an exercise for you to use with your technical specialists. Ask everyone to articulate what the value proposition is for your current services offerings? What value does it deliver to your client's and how does it positively impact the client's services business? Ideally everyone will score a 100 because that is what is required to establish trust, too.

Clients want to understand the value that your organization offers to them and how it will affect them. Benefit statements are a necessary part of this equation and like having business acumen should be tied into a well defined value proposition. The word value maybe be getting a bit shop worn these days, but we are all still value buyers.

## **#6. Building Trust Is Based Upon Creating Relationships**

For every technical specialist trying to transition to being a “trusted advisor”, creating relationships with clients is an essential component. But what is necessary to fulfill this mandate?

Below are a list of ideal skills that are needed:

- *Teaching everyone how to deal with different client personalities and how to flex to their particular style's in order to build fast rapport.*
- *Understanding verbal and non-verbal behavior*
- *Learning how to ask open-ended questions and probes.*
- *Being confident with interviewing techniques.*
- *Learning how to be an active listener.*
- *Knowing how to negotiate.*
- *Being familiar with how to manage conflict.*
- *Feeling comfortable managing group and team dynamics.*
- *Capabilities in the “nuts and bolts” of how to foster client development.*
- *Facilitation acumen.*
- *Knowledge in how best to display data in an interesting manner.*
- *Capabilities in managing client expectations.*

All of these skills are important, and when coupled with the other five areas discussed above, create a winning trusting combination with clients.

### **Conclusion**

What would happen if your clients trusted you more? All kinds of great things, like allowing you into enter into their world, asking for your advice, sharing what things will occur before they actually do, seeking you out to help other parts of their organization without the constant focus on just price, and treating you like a partner who has terrific ideas which are acceptable and highly valued throughout their organization.

Bottom-line, creating a trust based relationship with all your clients for your technical specialist is a journey worth pursuing. The skills learned in this process will ***always*** sustain the test of time. Remember, its all about building trust!

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