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## The Trusted Advisor

David H. Maister, Charles H. Green, and Robert M. Galford (Free Press, New York; 2000; ISBN 0-74320-414-X) \$25.50

REVIEWED BY ROSS DAWSON

As advisors, our livelihoods depend on developing trust with our clients. Yet this essential foundation for creating true value is rarely acknowledged or examined other than through platitudes. Many of us take refuge in our technical competence and avoid addressing the emotional issues that influence the ultimate value of our services.

*The Trusted Advisor* confronts this situation head-on, revealing what is often deeply repressed by professionals of every ilk: the humanity and emotion that are an inalienable part of all relationships, business and otherwise. Authors David Maister, Charles Green, and Robert Galford provide a detailed analysis of what they describe as the “process” of trust, to emphasize that trust evolves and can be developed over time.

Both the intent and structure of the book are designed to convince a hard-bitten and skeptical audience of the importance of these relatively intangible issues in actually creating value from the usually more tangible skills that are the core of professional expertise. The authors

clearly show that failing to address emotional issues in professional advice results in needing to continually seek new business and ultimately in less value created for both professionals and their clients. It is impossible to ignore either the logic behind the authors’ arguments or the thoroughness of their analysis.

The phrase “trusted advisor” neatly encapsulates the themes of the book. Maister and his coauthors propose that the difference between relationship-based client interactions—in which advisors are seen as a valuable resource—and true, trust-based client interactions is the “human dimension.” As such, trust-based interactions require a deep, personal relationship and recognition of interpersonal issues; in the deepest trust-based relationships, the boundaries between what is business and what is personal begin to blur. The highest levels of success in professional services cannot be achieved without reaching this level of trust. Technical experts can only offer value within the narrow confines of their domain, but professionals who have crossed into trust-based rather than purely technical relationships have the scope to advise their clients on a far broader range of business issues.

There is, however, an implicit asymmetry in the authors’ concept of a client-advisor relationship: an assumption that

the professional is always smarter than the client and knows what is right. This can lead to behaviors that are potential liabilities in today’s economy, such as providing “black-box” recommendations that leave the client literally none the wiser or failing to draw fully on the strengths and expertise of the client. Professionals at the pinnacle of their respective industries tend to work with highly sophisticated clients to co-create solutions and results that they cannot create separately; the boundaries between organizations blur to result in true partnerships. While some of these attitudes are embedded in *The Trusted Advisor*, the traditional view of the advisor seems to predominate.

“The Trust Equation” is a simple rule-of-thumb for indicating the degree of trust in different situations. Trustworthiness is the sum of credibility, reliability, and intimacy, divided by self-orientation, with each of these factors being assessed on a scale of 1 to 10.

This deconstruction of the elements of trust not only provides a ready reckoner for comparing client situations, but also emphasizes the critical role of each of these components. Many professionals think of trust as being based solely on credibility and reliability. However—without underemphasizing their importance—these factors are the easiest to

achieve, and insufficient in themselves. Intimacy is the domain of emotions, which Maister and coauthors characterize as the client thinking, “I feel comfortable discussing this . . .” Without intimacy there is only engagement on a technical level, and ultimately an inability to move the relationship to a broader scope and create value at that higher level. Self-orientation describes the degree to which clients believe that you do (or don’t!) have their interests at heart. Self-orientation is almost impossible to hide, and its use as a denominator in the trust equation reflects its dilution of any trust achieved through the other key factors.

*The Trusted Advisor* also details a five-step process to build trust: *engage* with the client on a specific issue, *listen* so the client believes he or she is understood, *frame* the client’s issues in a useful way, *envision* desirable futures, and *commit* to action.

One of the notable features of this framework is the authors’ concept of framing or re-presenting the client situation, which is a core part of any consulting process. They discuss framing from both rational and emotional perspectives. Rational framing—that is, creating new perspectives for clients on their situation—is central to traditional consulting approaches. However, perceiving, agreeing on, and acting on issues are almost always heavily laden with emotional issues, from internal politics and personal fears to the impact of decisions on others. No advisor can be effective without understanding and dealing with these issues; emotional framing not only can address these but also can create substantial value in itself by bringing hidden factors out into the open.

Professionals must take personal risks in order to build trust and create value, as Maister, Green, and Galford point out repeatedly. Their book provides every opportunity to take action, from a list of the fastest payback action items to metaphors of new styles of client interaction.

*The Trusted Advisor* is clearly designed and written to have a significant impact on the way professional services are delivered. It has the potential to shift attitudes and approaches to professional services. These changes are sorely needed; despite recent positive trends, there is still a certain rigidity to the way most professional services are delivered, which is tied to the way professionals perceive themselves and feel able to relate to their clients. True, trusted advisors are all too rare, which provides a tremendous opportunity for those who can develop the ability to understand and work with the emotional and interpersonal issues of both their clients and themselves.

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