

2020 Advisory Conference

October 27-29

Converging knowledge and behaviors to deepen client relationships

First-Choice Advisor “5C’s” Series: Courageous

Courageous

NOTES:



$$T = \frac{C + R + I}{S^0}$$

T = Trustworthiness

C = Credibility

R = Reliability

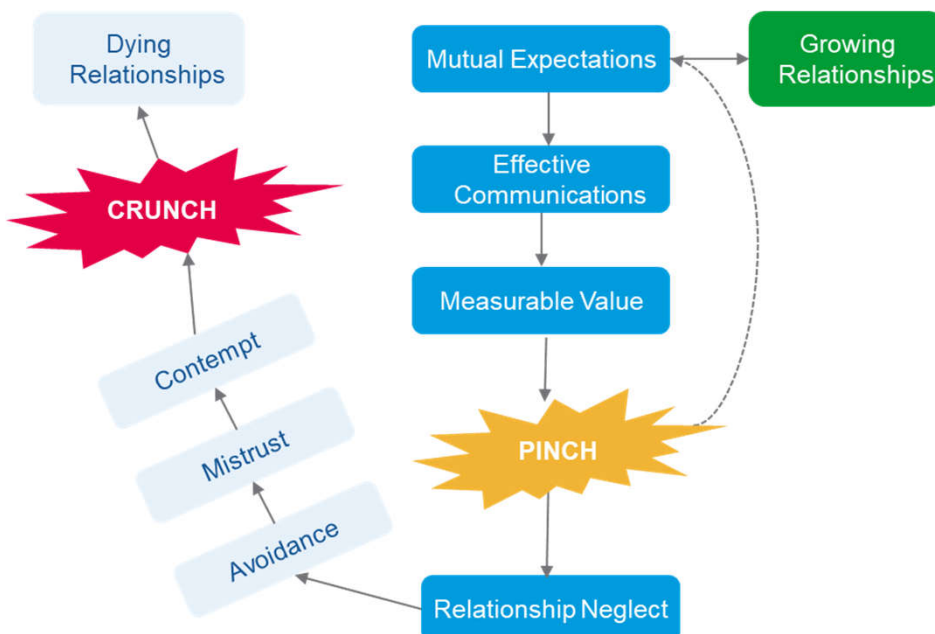
I = Intimacy

S^0 = Self Orientation

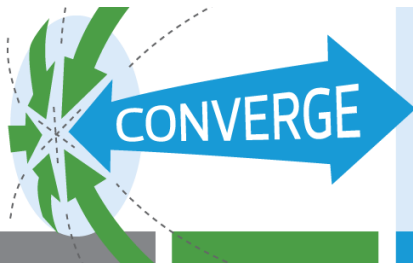
NOTES:

Adapted from – “The Trusted Advisor Fieldbook” – Charles H. Green

Pinch Model



NOTES:



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Establish a PACT

P A C T	ALIGNMENT: What synergies can we create by aligning with your people and priorities?	
	ANTICIPATION: In what areas would it be valuable for us to look ahead and/or provide proactive advice?	
	ADDING VALUE: In what ways can we be a strategic partner to you – making a true difference?	

NOTES:

The 5C's



We build strong long-term relationships by **understanding others** and their aspirations, and remaining **empathetic** to their unique challenges, needs and preferences.



We **ask probing questions** and **seek diverse perspectives** to gain understanding, challenge thinking and generate new ideas.



We believe that collaboration leads to better outcomes, and we **seek and share perspectives to encourage innovative thinking** to solve problems and enable others to seize opportunities.



We demonstrate strength and confidence in **challenging traditional ways of thinking** – having the courage to look forward and prepare for tomorrow.



We synthesize, apply and communicate complex information and concepts with clarity, objectivity and depth, and **bring our best thinking and advice** to help others make confident decisions.

NOTES:



Application Challenge

On-Your-Own Assignment:

- Select 1 of your **STAKEHOLDER RELATIONSHIPS** to focus on where you need to be more courageous.
- Over the next 30 days, be intentional to:
 - Establish a PACT with them
 - Address PINCHES as they occur