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Trusted Advisers

## Adviser puts communication at top of list for building trust

Houston Business Journal - March 2, 2007  
by [Mark Hordes](#)

A trusted adviser is anyone who actively engages in various aspects of client advisory business services -- attorneys, accountants, real estate agents, stockbrokers, insurance agents, consultants, bankers and sales, accounts and customer relationship managers.

All of these professionals have a responsibility to build trust with their clients, possess business acumen and be highly focused on delivering value in every interaction, regardless of the life cycle of an engagement.

Any person whose thoughts and actions are grounded in the principles of client respect and mutual collaboration is a trusted adviser. To the trusted adviser, the relationship experience is paramount and is based on caring about the client's long-term business interests.

For any company with professional services staff, following six client relationship building rules will guide personal interactions and lead to successful business dealings.

- Communicate transparency. In business situations, those who wish to develop a trust-based relationship should never lie, stretch the truth or state facts and circumstances that cannot be substantiated.

Develop transparency through honest dialogue and being open at all times with people. Start every conversation with the philosophy that honesty is the best policy, and observe how positively the other person responds. Being open and honest is highly contagious. For example:

"I've been thinking about what you said you need, but a less costly financial model might work best for your company at this time."

"This is a difficult assignment; may I share with you what has been challenging?"

- Share commonality. Sharing business or personal interests, experiences or views of the world is the fuel that starts a positive discussion. People like to work with individuals they like and with whom they feel they have something in common.

Discussing hobbies, children, sports interests, educational endeavors or world events creates a type of interaction that fosters a common bond. The more similarities shared with someone, the easier it is to develop trust.

One who seeks commonality immediately becomes more engaging. Words and body language communicate interest and curiosity:

"Nice to see you."

"I really enjoy fly fishing, too. Want to see a picture of the monster trout I just caught in Oregon?"

"How can I be of help?"

- Give respect. When a person understands and values the uniqueness of another individual with different opinions and ideas, he shares one of the highest orders of respect with that person.

In a business environment, especially when communicating with clients, it's critical to see the other person as an individual worthy of a neutral and objective point of view.

An adviser may strongly disagree with a client's view of the world on a certain issue. If so, a respectful way to respond is to say, "That's an interesting point of view, say more about that."

Even though an adviser may have definite points of views on many topics, born out of a lifetime of experiences and relationships, he should always remember to value the uniqueness of the individual who is sitting across from him and remember to give him the respect he deserves.

- Show caring behavior. Have the client's best interests at heart. Demonstrate the purposeful act of caring by communicating a willingness to learn about what success means to the other person, on both a professional and personal level.

Caring can be demonstrated through non-verbal behavior -- how a person listens, with facial expressions, by a nod of the head or leaning forward to show interest. Look directly at the other person. Caring is a rich emotional presence that, when combined with respect, commonality and transparency, adds an emotional context to the trust-building process. For example:

"Our security group has recently completed several projects for a large company, and it was able to eliminate several serious roadblocks that stopped fraud cold. Our lead consultant can come in and share the case study with you. Would that be helpful to you?"

- Ignite credibility. Demonstrate credibility by competence, fairness and integrity. Trusted advisers always follow a set of internal integrity beliefs that guide behavior. They also demonstrate credibility by sharing lessons learned and best practices gleaned from other engagements, and relating skills and experiences to the situation in front of them. For example:

"This financial and legal transaction project feels just like the one we did with Star Global Corp. Can I share with you a few lessons we learned and best practices we discovered?"

Trusted advisers speak freely and are not afraid of giving important information that will benefit the client's decision-making process and thinking. They try to be fair in all areas of negotiations and to base fees on value-creating actions and activities.

- Embrace reliability. An adviser who consistently follows through on what he says he will do establishes reliability. Promises that aren't intended to be kept should be avoided. Trusted advisers build a track record of coming through for someone. Actions speak louder than words.

A Chinese saying is, "May you live in interesting times." The world of business advising and building strong client relationships built on trust-based interactions is getting more complicated, technology and financially driven -- and impersonal. Developing trusted advisory skills, behaviors and actions akin to being more communicative and open will personalize each client's world and make it less complicated.

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