

# Appendix 1: Strengths

## Credibility

“Honesty builds credibility as much as experience does.”—*The Trusted Advisor Fieldbook*

People tend to believe what you say. You demonstrate expertise, experience, and knowledge. People trust you because they feel your information is solid, your recommendations are sound, and they have faith in your ideas and decisions.

You possess a mixture of characteristics such as:

- You are logical
- You are honest
- You are a good communicator
- You are accomplished
- You have strong credentials and expertise in your area

## How You Can Leverage This Strength

Credibility isn't just about credentials, mastery, high IQ, and being “smart” as in intellectual. It is also about the less tangible sides of credibility: being more truthful, being more open, and sharing more truth. These characteristics will ultimately help you be more persuasive. Pay attention to things like body language, eye contact, vocal tones, and phrasings. Try making greater use of stories or metaphors. Involve the other person more specifically in examples to increase the identification with the advice you are providing.

Read more at <http://trustsuite.trustedadvisor.com/appendix>

## Reliability

“Promises made and kept, track records, and integrity are all part of reliability.”—*The Trusted Advisor Fieldbook*

Reliability is demonstrated in the realm of actions. People rely on you; they depend on you to do what you've said you will. People trust you because they know you will follow through on your promises—that you take your commitments seriously.

You possess a mixture of characteristics such as:

- You are consistent
- You are predictable in your actions and behavior
- You are grounded
- You are dependable
- People feel they know you

## How You Can Leverage This Strength

Leading with reliability makes you the one to count on. Find more opportunities to make promises—and keep them. Notice that this is something you are good at. Put yourself in situations that benefit from a need for reliable behavior, such as following through after meetings or brainstorming sessions, and in the face of general uncertainty and chaos.

Read more at <http://trustsuite.trustedadvisor.com/appendix>

# Intimacy

“Intimacy expands the range of things you can talk about with others.”—*The Trusted Advisor Fieldbook*

People feel safe around you and share their inner thoughts with you. You see others as whole human beings and are willing to expose your own humanity around them.

You possess a mixture of characteristics such as:

- You are open
- You are able to keep confidences
- You take personal risks
- You are tuned in to others’ feelings
- You are discreet

## How You Can Leverage This Strength

Notice that you are skilled at being intimate. Be aware of it and come to rely on it. Often people with high scores on intimacy are very careful with other people’s feelings and are willing to take on the sharing of confidences that others would find risky. As you appreciate this strength, be willing to put yourself into situations that require tact, sensitivity, and good interpersonal skills. Because you know how to take personal risks, take more of them. Ask the hard questions and raise the uncomfortable topics. You pull it off better than anyone else.

Read more at <http://trustsuite.trustedadvisor.com/appendix>

# Self-Orientation

“Let me check my ego at the door, and simply be there to help others as best I can.”—*The Trusted Advisor Fieldbook*

A favorable score on Self-orientation implies a *low* Self-orientation. You are able to see beyond your own goals and focus on another person. You get satisfaction when you participate in another person’s success. People trust you because they feel you pay attention to them and their needs—that you care about their success as well as your own.

You possess a mixture of characteristics such as:

- You are curious and inquisitive
- You are open-minded
- You are non-threatening
- You focus on building relationships, not just one-time transactions
- You are altruistic

## How You Can Leverage This Strength

Ironically, your strength lies in the fact that you don’t think of it as a strength but simply as the way you relate to others. Having low Self-orientation opens the door for others to trust in your motives and unselfish agenda. Notice that focusing on others’ goals, objectives, and behavior has the effect of making things better for you as well. As you focus on others, you invite them into conversations and relationships that are mutually appreciative and collaborative. Because your ego is in check, you are less likely to allow a need to control get in the way of progress.

Read more at <http://trustsuite.trustedadvisor.com/appendix>

# Appendix II: Opportunities for Improvement

## Credibility

“Honesty builds credibility as much as experience does.”—*The Trusted Advisor Fieldbook*

Your biggest area for improvement is increasing how much people believe what you say. You may have “credibility gaps.” People may not be sure you know what you’re talking about because you may demonstrate lack of expertise or experience. Or you may have the expertise but struggle to communicate that effectively.

## What You Can Do to Improve Your Credibility

By making some relatively minor changes in how you conduct yourself, you will increase your credibility, and by extension, earn more of others’ trust.

- Work to be more logical and clear in your thinking and presentation.
- Improve your credentials.
- Communicate in ways that help people to relate to your message.
- Focus on applying your expertise, rather than talking about it.
- Be truthful—and also speak more of the truth.
- Do not stretch the truth or over-reach your credentials.
- Customize your message and make it relevant.
- Review your messages with others.
- Be open about your concerns with others.
- Be open to suggestions.
- Take speaking programs to enhance your presence.
- Be open about difficult situations with others.

## Six Fast Payback Actions to Create Credibility

1. Show you’ve done your homework.
2. Have a point of view—and state it.
3. Speak the truth, always.
4. Answer direct questions with direct answers.
5. Express your passion.
6. Convey confidence.

You can immediately put into practice some of the suggestions above. Our studies have shown that it’s much more important to build on your trust component weakness than to merely focus on your strong suit. Even the smallest change in improving your credibility will help make you more trustworthy.

Further reading on improving Credibility:

1. [The Point of Listening is Not What You Hear, but the Listening Itself](#)
2. [Being Right is Vastly Overrated –Part I](#)
3. [Being Right is Vastly Overrated –Part II](#)
4. [Three Little Words](#)
5. [Selling by Doing, Not Selling by Telling](#)
6. [I Screwed Up](#)

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# Reliability

“Promises made and kept, track records, and integrity are all part of reliability.”—*The Trusted Advisor Fieldbook*

Your biggest area for improvement lies in increasing how much people rely on you and are willing to depend on your actions. We determined that this is your area of opportunity based on how you answered the questions that tested for reliability.

## What You Can Do to Improve Your Reliability

By making some relatively minor changes in how you conduct yourself, you will increase how reliable you are, and by extension, be worthy of others' trust.

- Be consistent in your words and actions.
- Say what you'll do, and do what you said.
- Be careful that you don't give surprises.
- Be predictable and steady in your behavior and demeanor.
- Think before making commitments.
- Establish some routines in your relationships with others.
- Track your own track record.
- Clarify milestones and deliverables.
- Confirm expectations—then meet them.
- Immediately communicate with those affected when you are unable to fulfill a promise and reset expectations.

## Four Fast Payback Actions to Increase Reliability

1. Make lots of small promises and rigorously meet them.
2. Be one minute early, always.
3. Use others' terminology and references.
4. Dress appropriately.

You can immediately put into practice some of the suggestions above. Our studies have shown that it's much more important to build on your trust component weakness than to merely focus on your strong suit. Even the smallest change in improving your reliability will help make you more trustworthy.

Further reading on improving Reliability:

1. [The Relationship is the Customer](#)
2. [Don't Exceed Expectations](#)
3. [Trust in Teams: 25 Behaviors That Foster Mistrust](#)
4. [The Single Fastest Thing You Can Do to Increase Trust](#)

All articles available at [trustedadvisor.com/articles](https://trustedadvisor.com/articles)

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# Intimacy

“Intimacy expands the range of things you can talk about with others.”—*The Trusted Advisor Fieldbook*

Your biggest area for improvement lies in helping people feel safe around you. This may involve being willing to share your inner thoughts with them so they will feel comfortable sharing their inner thoughts with you. As people begin to open up to you, it's critical that you honor their disclosures. Improvement in this area really pays off in that people will trust you and want to deal with you because you relate to them as human beings.

## What You Can Do to Improve Your Intimacy

- Avoid gossip.
- Simply observe others, and ask about their feelings.
- Talk more with your eyes, ears, and body and less with your mouth.
- Don't be afraid to comment on others' feelings.
- Be willing to risk sharing personal things about yourself.
- Comment on your own feelings, but only when not obtrusive.
- Be willing to risk inviting others' personal conversations about themselves.
- Don't push intimacy, but make it welcome.
- Treat silence as your friend.
- Work at having people take you into their confidence.
- Respect confidential information.
- If an email would embarrass you or someone else, don't write it.

## Four Fast Payback Actions to Increase Intimacy

1. Name the proverbial elephant in the room.
2. Listen with empathy.
3. Tell your partner something you appreciate about him or her.
4. Be yourself, and let it show.

You can immediately put into practice some of the suggestions above. Our studies have shown that it's much more important to build on your trust component weakness than to merely focus on your strong suit. Even the smallest change in improving your intimacy will help make you more trustworthy.

Further reading on improving Intimacy:

1. [The Point of Listening is Not What You Hear, but the Listening Itself](#)
2. [My Client Is a Jerk: Three Keys to Transforming Relationships Gone Wrong](#)
3. [Intimacy 201](#)
4. [Show Me the Elephant](#)

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## Self-Orientation

“Let me check my ego at the door, and simply be there to help others as best I can.”—*The Trusted Advisor Fieldbook*

Your biggest area for improvement lies in focusing on what other people are saying, doing, and wanting. Your challenge is to see beyond your own goals and focus on another person. The result will be the satisfaction you get when you participate in another person’s success. People will trust you because they feel you pay attention to them and their needs—that you care about their success as well as your own.

### What You Can Do to Reduce Your Self-Orientation

Focusing on others’ best interests pays off for you in the long run. By making some relatively minor changes in how you conduct yourself, you will increase your other-orientation, and by extension, be worthy of others’ trust.

- Practice thinking about others.
- Make lists of questions for them.
- Notice their habits and interests.
- Practice public speaking.
- Live more in the moment by noticing what’s going on around you.
- Fret less about what you’re going to say next.
- Worry less about whether you are making the sale.
- Stop trying to control or manipulate others; view them as people in their own right.
- Ask people how they are doing and really listen to their answers.
- Check your ego at the door.
- Notice it’s not really about you.

### Eight Fast Payback Actions to Shrink Self-Orientation

1. Give ideas away by brainstorming with clients before they’ve even signed a contract.
2. Offer your expertise and experience in a helpful way without expecting payment for everything you say.
3. Build a shared agenda.
4. Don’t jump to problem-solving prematurely.
5. Ask open-ended questions.
6. Ask questions that may seem out of scope.
7. Relax your mind.
8. Practice thinking out loud.

You can immediately put into practice some of the suggestions above. Our studies have shown that it’s much more important to build on your trust component weakness than to merely focus on your strong suit. Even the smallest change in diminishing your self-orientation will help make you more trustworthy.

Further reading on lowering Self-orientation:

1. [Three Little Words](#)
2. [The ABC 20 Question Rule](#)
3. [Why Nobody Cares About You, and You Should Be Glad They Don’t](#)
4. [Trust Tip 14: More Hard Talk About Soft Skills](#)
5. [Does This Make My “S” Look Big?](#)
6. [Impeccability vs Perfection: Who’s Got Your Back?](#)
7. [I Screwed Up](#)
8. [Customer Centricity vs Customer Cultures](#)

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# Appendix III: The Trust Temperaments

## CR- The Expert

### Your Trust Temperament: The Expert

If your Trust Temperament™ is CR, you are an Expert. You rely on Credibility and Reliability to build trust. People come to you for your expertise and your follow-through. They tend to believe what you say.

**You care about...** what others think of your work.

**You're great at...**solving the hard problems.

You might be characterized as the subject matter expert in your area. You probably did well in school and enjoyed mastery of subjects; maybe you were "the brain" and you may still enjoy being the smartest person in the room.

You're self-governing and are able to prioritize tasks to get things done. You only make commitments you know you can deliver on. You say what you'll do and do what you say.

As an Expert, you probably love winning. You can be driven and competitive-just look at those diplomas on the wall and the trophies in the trophy case.

**Your motto:** "Lead, follow, or get out of the way."-*Thomas Paine*

**Benefit to your organization:** Your clear presentation of facts and analysis, along with your informed decision-making, help clients believe that your organization can be trusted.

**Others see you as...**reliable, well-informed, up-to-date, and proactive.

**Watch out for...**times when your objectivity blocks you from taking emotional risks. You may believe it's a virtue to be impartial and analytical; keep in mind, however, that trust depends highly on caring about others and Intimacy (the willingness to take emotional risks). Your expertise may at times come across to others as arrogance.

**We think of...**Warren Buffett-investor, Alan Greenspan-economist, Christine Lagarde-Managing Director of the International Monetary Fund, Vince Lombardi – football coach

# CI- The Catalyst

## Your Trust Temperament: The Catalyst

If your Trust Temperament™ is CI, you are a Catalyst. You combine Credibility and Intimacy; others trust your expertise and feel safe around you. You are the spark that makes things happen.

**You care about...**big issues, framing problems, and gaining insights.

**You're great at...**brainstorming and coming up with new ideas.

You might be characterized as the idea person. You are adept at sparking new ideas and eliciting ideas from others. You're skilled at incorporating them all into a cohesive plan of action. You strive to keep a group balanced and see that everyone's thoughts are taken into account.

As a Catalyst, you like to make up your own rules and succeed according to them. "Conventional wisdom" is a challenge for you.

**Your Motto:** "So what if it's not broken; we can make it better."

**Others see you as...**a synthesizer and integrator. They count on you to frame issues in a clear and complete way. They look to you for your expertise and yet know that you value their input.

**Benefit to your organization:** Your ability to combine lively thinking with attentiveness to other people makes you valuable on any team or problem-solving group.

**Watch out for...**poor follow through. Catalysts often depend on other people to carry out their ideas and may allow things to fall through the cracks. You may find yourself missing commitments made in the enthusiasm of the moment. If this is a problem for you, look at ways to increase Reliability.

**We think of...**Bill Clinton-former US President, Henry Kissinger-political scientist, Robin Williams-actor, Dr. Martin Luther King, Jr.-activist, Marshall McLuhan—author, Thomas Jefferson—American patriot and founding father, Indra Nooyi—Chairperson and CEO of Pepsico

## CS- The Professor

### Your Trust Temperament: The Professor

If your Trust Temperament™ is CS, you are a Professor. You scored high on Credibility and have low-or favorable-Self-orientation. People trust your expertise and sense that self-interest is not a ruling factor in your dealings with them.

**You care about...**sharing ideas with your clients or students.

**You're great at...**acquiring new knowledge and sharing it with others.

You may be characterized as the person at a meeting who sits back and listens, then leans in with just the right insight or brilliant idea. You love the content of your work; you enjoy thinking about it and exploring where it will go. You enjoy knowledge for its own sake rather than for how it can benefit you personally or even its practical applications. You get great satisfaction when others benefit from your knowledge. You seldom get sidetracked by ego.

As a Professor, you tend to share your expertise through the more impersonal means of lectures, articles, and books rather than through mentoring or coaching. You are generous with your discoveries and ideas because you care about others' success.

**Your Motto:** "Curiosity has its own reason for existing."-Albert Einstein

**Others see you as...**knowledgeable and really smart. You gain respect from other people by sharing your thoughts and original insights. Chances are you're well-liked, even if people don't feel they know you well. If your mind wanders at times, it's always down an interesting path.

**Benefit to your organization:** Your quest for more knowledge enriches those you share it with.

**Watch out for...**a lack of Reliability, a key trust component. You may frustrate those around you if you miss deadlines or fail to complete your part of a team project. Great ideas may sidetrack you from everyday tasks. And if you scored low on Intimacy, others may wish to become closer to you but find that difficult as you are in a world of ideas rather than feelings.

**We think of...**Albert Einstein-physicist, Albus Dumbledore-fictional wizard and teacher, Lao Tzu-philosopher, Marie Curie-chemist and physicist, Sanjay Gupta-neurosurgeon

## RI- The Doer

### Your Trust Temperament: The Doer

If your Trust Temperament™ is RI, you are a Doer, someone who is strong on Reliability and Intimacy. People rely on you; they depend on your actions. They feel safe around you and may often share their inner thoughts with you.

**You care about...**getting the job done and getting others to help.

**You're great at...**meeting deadlines and adhering to budgets.

You might be characterized as a kindly drill sergeant, someone who is tuned in to other people and, at the same time, focused on getting them marching in the right direction to accomplish the task. You have a roll-up-your-sleeves style and are matter-of-fact in your approach, often working behind the scenes to ensure that you have the "votes" to get things done.

As a Doer, you step up to organize a project. You make things happen and work hard to see things through. You either have the answers or know where to get them, oftentimes relying on the trust you've built in one-to-one relationships to get things done. You are probably diplomatic, optimistic, and a good listener.

Your Motto: "Let's roll up our sleeves and all pitch in."

**Others see you as...**grounded, and they often find you inspirational because of that. They trust your common sense. Because you're very personable, people are willing to follow your direction. People value your organization, dependability, sincerity, and predictability.

**Benefit to your organization:** You motivate others to stay on task.

**Watch out for...**your perfectionism and using manipulation to get things done right. You may focus on the task at hand at the expense of seeing the overall goal. Because your word is your bond, it's hard for you to understand when others don't do what they've promised. To increase others' trust in you, look for ways you can broaden your interest in other points of view.

**We think of...**Michelle Obama-First Lady of the United States, Eleanor Roosevelt-former First Lady of the United States, Sergio Marchionne-CEO/Chairman of Fiat and Chrysler, Angela Merkel-German Chancellor

## RS- The Steward

### Your Trust Temperament: The Steward

If your Trust Temperament™ is RS, you are a Steward. You are Reliable and have a low—or favorable—Self-orientation. Others can count on you to do what you say you will; you have their best interests at heart. Your skill in leadership comes from your willingness to serve rather than a desire to dominate.

**You care about...**fulfilling the mission, taking care of the organization.

**You're great at...**not letting your ego interfere with your work.

You might be characterized as a kind of missionary or servant/leader, someone who is focused on the good that will come from the work you do rather than your own personal gain. You take it as your personal responsibility for a project to succeed. You can just as easily take a leadership role or worker bee role depending on what is needed. You are an integral part of any group, and view responsibilities as something you've been *entrusted with*, not just duties you have to fulfill.

As a Steward, you care deeply for the team as well as the job. You don't go to sleep until your work is done. You keep your clients' interests top-of-mind and you achieve your goals through helping others achieve theirs. You are tireless, selfless, and driven by a desire for the greater good.

**Your Motto:** "Do whatever it takes to meet the mission."

**Others see you as...**genuine, consistent, and dependable. They don't worry that you have a hidden or selfish agenda. They appreciate that you can see both sides of a case and think from their point of view.

**Benefit to your organization:** You assume the role of caretaker of any group you are in, whether it's in your job description or not.

**Watch out for...**being seen as unambitious. Others may interpret your collaborative nature as a lack of personal ambition. In order to gain the most trust from those around you, you could increase your Credibility by being clear and vocal on where you stand.

**We think of...**Margaret Mead—anthropologist, Bono—singer/humanitarian, Morgan Freeman—actor, Steve Wozniak—co-founder of Apple Computers, Aung San Suu Kyi—Nobel Peace Prize winner, Ursula Burns—Chairperson of XEROX

## IS- The Connector

### Your Trust Temperament: The Connector

If your Trust Temperament™ is IS, you are a Connector. You combine Intimacy with low-or favorable-Self-Orientation. You are magnetic and caring. People feel safe around you and willingly share their inner thoughts with you. Not surprisingly, you make great connections.

**You care about...**other people.

**You're great at...**accomplishing things through others.

Although you may or may not be outgoing, you may be characterized as a people person, someone who is approachable and personable. Chances are that you always know what's going on in every part of the organization and can find out who to go to on any issue because you have a wide network. You are great at disseminating information and taking the pulse around the company.

As a Connector, you easily win the trust of clients, colleagues, and subordinates. Your great listening skills make it easy for people to disclose sensitive, personal information to you. You are also willing to take personal risks and allow yourself to be vulnerable.

**Your Motto:** "People who need people are the luckiest people in the world."

**Others see you as...**really caring about them. They can trust you with their feelings and concerns. People come to you to find out what's really going on.

**Benefit to your organization:** You bring the humanity into every situation and have invaluable insights for the leaders of your organization.

**Watch out for...**neglecting to boost your own credibility and authority. You may need to bolster your credibility by learning from all those you can tap into and by asserting yourself. Work on earning the trust of higher ups and focusing on your own career goals.

**We think of...**Oprah Winfrey-television executive, Malcolm Gladwell-author, Ellen DeGeneris-talk show host, Jim Henson-creator of "Sesame Street"

## Appendix III: The Assessment Questions

Trust Component	Element Test	Question	Ques. #
Credibility	Logical, clear communicator	<b>People see me as a logical and clear communicator:</b> what I say makes sense, and people compliment me on it.	2
	Tells the truth, and the whole truth	<b>People tell me I'm honest and open:</b> when I say something, people view it not just as true, but as the whole truth; they don't think I'm holding back; they feel I'm giving them the whole picture.	4
	Listener can relate to the message	<b>People can relate to me:</b> they feel at ease and comfortable with me, I fit right in with the way they think and talk and with their interests.	9
	Demonstrates ability	<b>I am really good at what I do:</b> I have a lot of expertise in my area, based on experience, talent and hard work, and people recognize that about me.	12
	Has strong credentials	<b>I have strong credentials:</b> my degree, my training, my affiliations and my experience are all viewed positively by other people.	16
Intimacy	Takes risks regarding self	<b>I am not afraid to take emotional risks by being open about myself:</b> to acknowledge some failing about myself, or to engage in a conversation where I'm not an expert, and to admit my limitations.	5
	Others confide in	<b>People confide in me:</b> they tell me things they often don't tell others; they share with me things they consider private or personal.	8
	Takes risks regarding others	<b>I am comfortable taking personal risks by engaging with the other person:</b> I know that my intentions are good and am confident that the other person will see that; hence I am comfortable asking questions or raising topics that others in my position might avoid out of fear of appearing controversial or intrusive.	13
	Empathetic	<b>I empathize with others, and am at ease letting them know it:</b> people have all kinds of feelings; I'm sensitive to them all, and am comfortable sharing my own responses to their feelings, and they know that and appreciate it.	14
	Discreet	<b>I'm known to be discreet:</b> people will talk to me about issues of personal or professional concern to them, even if I'm not an expert in that area, because they know I'll keep things between us.	18
Reliability	Feels familiar	<b>People tell me they're at ease with me:</b> they have a good sense of who I am, they feel they know me, they know what to expect when they see me, talk to me, deal with me.	1
	Is consistent	<b>I am consistent and predictable:</b> people know what to expect from me, and they get it. I am the same person at all times, and the same to all people.	6
	Keeps his or her word	<b>My word is my bond:</b> I keep and deliver on my promises; I see keeping my word as a matter of personal integrity.	10
	No surprises	<b>I work to make sure there are no surprises when I'm around:</b> I use my customers' vocabulary, I respect and reflect their norms and environment; I	17

Trust Component	Element Test	Question	Ques. #
		make sure that their expectations of me are consistent.	
	Dependable	<b>I do what I say I will do:</b> I am rigorous about follow through and delivering on promises; when I am unable to fulfill on a promise, I immediately get in communication to reset expectations.	19
Self-Orientation	Doesn't lead with blaming others	<b>I don't focus on blaming others when things go wrong:</b> I focus on the learnings, and move on easily from disappointment, without attachment to the past.	3
	Leads with curiosity	<b>In interactions with others, I lead with curiosity:</b> my motivation is less about achieving a goal or preventing loss or embarrassment than it is about asking questions, learning, and discovering ways to improve things for them.	7
	Not tied to a particular outcome	<b>I am not wedded to a particular outcome:</b> I am comfortable changing agendas and objectives, with the end goal of simply making things better for the customer, no matter what result that might entail.	11
	Focused more on long term relationship than on transaction	<b>I'm OK with losing a short term deal if it improves a long term relationship and helps the other:</b> I believe that behaving that way improves the relationship, and pays back more strongly over time than being opportunistic.	15
	Achieves goals through others' achievements	<b>I achieve my goals as a byproduct of helping customers get theirs:</b> I like winning, but I see it as an outcome not a goal; I figure if I help my customers win, I will win too.	20