



totem

Evolving the Trusted Advisor

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Calling Time on The Trusted Advisor?

The Trusted Advisor model introduced us to the wonderfully common sense, yet rarely common action approach to building strong relationships as advisors. The model was and still is invaluable for sales, consulting and internal advisory functions like HR, Finance and IT, in showing us how to build trust and therefore achieve better outcomes.

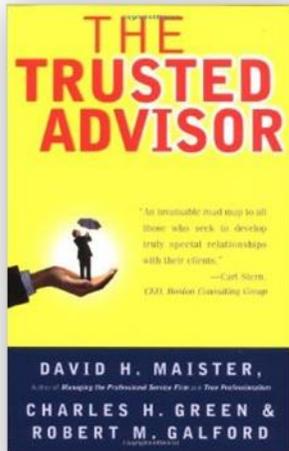
The Challenger research from CEB came about in 2009, when their members were asking, “how do we continue selling through a recession?” Yet what CEB discovered was a far more powerful finding: That certain behaviour resulted in higher sales performance, whatever the economic context.

And building strong relationships was not the winning formula: “As critical as strong customer relationships may be, familiarity alone isn’t enough to win business.”

So does the Challenger research mean the Trusted Advisor model is obsolete?

Not necessarily. What is clear however is the need for a renewed focus on bringing constructive challenge into advisory conversations, to make them even more powerful.

Here we’ll look at each model, how they might be complementary and some recommendations for businesses.



The Trusted Advisor Model

The trust equation from the Trusted Advisor is:



We need to demonstrate **credibility** - through what we say, how we say it and the quality of the questions we ask.

We need to be **reliable** – doing what we said we would, on time. This includes being upfront about problems or mistakes and still being reliable when things have gone wrong.

We need to have **intimacy** – building rapport and understanding people’s needs beyond simply getting the job done. What are their values or drivers? Do we have other things in common?

Finally, the level of self-interest we bring to our conversations, reduces trust. If I think you’re just trying to sell me something or get your own way, I become cynical of you and more critically evaluate advice you give me.

We need to come into conversations with self-interest parked or put to one side – to show we’re there for the other person, and get the best outcome for both parties.



Challenger Behaviour

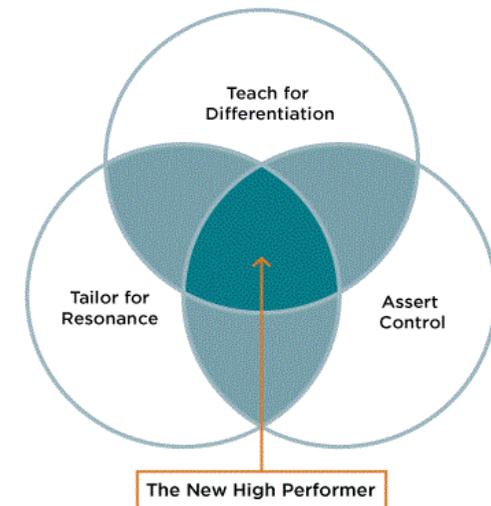
CEB's research revealed that sales people's behaviour puts them in one of five categories – the most commonly assumed as linked to success being the Relationship Builder, and the new shock for us all, the actually most successful one – the Challenger.

Relationship Builders ask good questions, resolve or diffuse tension and work hard to build a harmonious, pleasant relationship with clients. Companies have invested millions training their sales teams to do this better, ask more probing questions, uncover needs etc.

Comparing the actual sales performance of people across industries and countries, CEB discovered that the Relationship Builder was the least common behaviour of high performers. The best sales people out there were instead displaying Challenger behaviour.

Challengers succeed in sales (though we could argue this goes for any influencing role, not just external client sales), by excelling at teaching, tailoring and taking control.

As the Relationship Builder is focused on being accepted into the customer's comfort zone, the Challenger is pushing people out of it. Constructive challenge and a level of tension are the tools for demonstrating value-add and securing customer loyalty.





Does This Sound Accurate?

Let's consider a classic sales conversation. The meeting begins with small talk and a catch up on the holidays. Then the sales person launches into some probing questions – “what’s keeping you up at night?” “What are your strategic priorities?” “What’s really going on in your business and market?” Despite the masses of training people have invested in, to make sure these are the questions being asked, CEB’s research shows that the customer’s response to this approach is now, “stop wasting my time!”

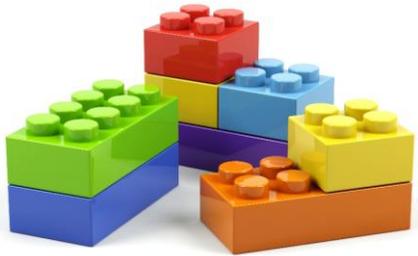
Customers are time-poor, so being asked lots of questions and giving lots of one-way information is simply frustrating. The sales person has not added value in the meeting, they have just gathered information – and maybe closed with “our products and services can help with that.” It’s a bore and a waste of customers’ time.

What does the Challenger do that’s different?

They start by saying what classic challenges similar companies are facing. This is teaching and showing the customer that they’re not alone if they face similar problems. Challengers go through a process of telling stories, helping customers re-frame their problems and see how they can solve them – all before even mentioning what products and services are on offer. This is high value-add and leaves customers feeling this might be one of the best hours spent in their day.

Challengers then tailor their offer to the specific client company and to each individual they speak to. Every stakeholder will have different needs, so the benefits of the product or service will be described in the most impactful way for each person to buy into it.

Finally, throughout the meeting, the Challenger takes control. If the customer says “we’re different, those issues don’t apply here,” the Challenger will control the debate and maintain a level of constructive challenge. If the customer wants to push on price, the Challenger brings the conversation back to value. This is a commercial formula that wins sales and customer loyalty.



Could the Models be Complementary?

We believe so – though it may have got lost in translation. Many companies' relationship building development programmes for sales people, have focused more on the question asking and keeping harmony with customers – but that's not really what the Trusted Advisor model suggests.

Trust is about building credibility and offering good advice – which does of course include asking good questions. But surely the same is true of the Challenger behaviour: To teach you and take control of the conversation – you'll have to trust me and believe I know what I'm talking about. That suggests I have built credibility and given good advice.

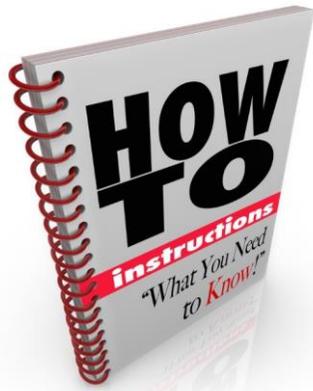
Building in wider research

Steve Denning's review of agile organisations and successful companies in the 21st Century, reveals that businesses focused on delivering customer delight, do better than those just trying to make money. How does this apply here?

The Trusted Advisor model highlights the need for low self-interest. If a Challenger is driven by the need to close a deal and win the sale, then the way their teaching and taking control behaviour comes across is different to someone wanting to primarily win by delighting the customer. Supporting this idea, CEB's research discovered that the most successful Challengers were comfortable with silence and ambiguity, feeling less driven towards closing a sale than their colleagues. That again suggests less of a direct self-orientation to win the sale.

The suggestion here is that the Challenger requires credibility, reliability, intimacy and low self-orientation, in order to have the highest impact in teaching, tailoring and taking control. As an example, customers commented that Challengers had added value and given them insights they wouldn't have stumbled across alone. That sounds like credibility. Likewise customers were more likely to buy from Challengers who had built advocates across the business, making it easy for consensus decision-making. That sounds like reliability coming across in consistently high quality interactions, and intimacy in building relationships with all those stakeholders.

It seems plausible that the two ideas are not mutually exclusive, but highly complementary or even cyclical in nature. You need to build trust to be a great Challenger – and great Challengers become known as Trusted Advisors.



How to Apply This to Your Business?

Review your spend on sales skills development

What skills are being developed? Are you teaching people to develop warm, safe relationships that may not give you the best commercial outcomes? Has the message of building relationships been misinterpreted to mean that people should offer discount and anything else clients ask for to keep them happy? Add on top of the skills development in asking questions and advising effectively, the skills in commercial teaching, tailoring and taking control of the conversation.

Apply these skills to advisory functions too

In his fantastic book, *To Sell is Human*, Daniel Pink highlights that “1 in 9 people work in sales. So do the other 8.” His point is that we all have an aspect of selling or influencing to our roles now – so selling skills are not reserved for those 1 in 9 who have sales in their job titles.

What skills are being encouraged and developed in HR, Finance, IT? Are we telling people to build relationships and become greater experts in their fields, without showing them how to challenge, teach and influence the rest of the business? There is a great opportunity here to apply the principles of Challenger sales, to Challenger internal advisors – as in one way or another, we’re all selling some idea or some objective we want others to work towards.

Work on your own insight centricity

Talking about being customer-centric or focused on adding value are beyond clichés now. People are sick of hearing that this is what makes a company unique – when everyone is saying the same thing. Whatever your role and interest in this content, how could you offer more insights to your internal or external customers? What do you know about the market, industry or typical challenges people face, that you can share with your stakeholders to demonstrate your value-add? What resources do you have available to you that could be used in growing this insight and sharing it with others?



The Exciting News

The Challenger research gives us practical, behavioural tips and tools we can all learn to have more impact in sales and influencing. The Trusted Advisor model still stands and is a great foundation to build on, for even more effective commercial (and non-commercial) wins.

And as a great story to close on, I asked a friend at dinner about someone she works with who displays classic Challenger sales behaviour. Knowing nothing about my interest or this article, I was impressed with her final statement:

“the thing is, once clients have met him and seen how much insight and value he adds, he becomes their trusted advisor. They call on him first because they trust he can help them.”

about Totem

People at their Best

build:

We support you in uncovering your vision, mapping talent and developing end to end processes to manage talent within your organisation.

Focusing on profits through people



engage:

We help you to engage individuals and teams—supporting change, gaining commitment to your vision and retaining your highest performers.

Making sure you get the best from your people



assess:

We provide you with tools, techniques and assessors to help you map the talent and potential of individuals in your organisation and/or in selecting new talent.

Helping you recruit people who fit and deliver results



develop:

We design and deliver exceptional, focused and blended development, allowing each individual to grow in their role, capability and motivation.

Maximising potential and personal contribution



What our clients say about us:

We're nimble

"What sets Totem apart? It is their ability to be very thorough in their approach whilst at the same time willing to offer innovative suggestions that can be implemented in a time and cost effective way. Would I recommend them to others? Without question!"

HR Manager, Pulse

We get them

"I'd definitely recommend working in partnership with Totem – I say partnership, as this is exactly how they operate. They seize every opportunity to learn more about your business and by doing so are able to support projects with this insight, often going above and beyond the original scope."

Resourcing Manager Carphone Warehouse

We inspire confidence

"...combining her extensive organizational psychology knowledge with a wealth of insight gained during her years as a professional actor Liz offered our business something that was truly unique."

The result of this is a powerful and thought provoking blend of theory and practice which demystifies the art of communicating and influencing effectively in formal and informal situations."

Talent Manager HML