

Lesson 07: Get Your Advice Heard and Taken

Lesson Overview

It's easy to assume your good advice doesn't get taken because you weren't compelling enough, or maybe (if you're honest about what you're thinking) because they weren't smart enough. While either or both may be true, they're not likely the real reason your advice doesn't get taken. This lesson explores what that real reason is, and what can be done about it.

Leader Prep

Prior to leading this lesson discussion, we suggest you:

- Complete *Lesson 07: Get Your Advice Heard and Taken*. Watch the video and complete the self-study guide. Be sure to review the additional reading suggested at the end of the self-study guide:
 - How to Acknowledge Another When You Don't Agree in Chapter 6 of *The Trusted Advisor Fieldbook* (pp. 46-47).
 - Listening to the Sequence in Chapter 11 of *The Trusted Advisor* (pp. 100-101).
 - The following two articles:
 - [The Art of Listening: Establishing Trust Without Saying a Thing](#)
 - [Why Your Most Difficult Relative Will Make You a Better Professional](#)
- Prepare your own stories/examples to share with participants.
- Review the PowerPoint deck for this lesson and, if you plan to use it, remove any content you don't intend to cover and/or otherwise edit it to suit your presentation style. Note that the deck may include animated content, so be sure to review it Slide Show mode.

Lesson Objectives

As a result of this lesson, participants can expect to:

- **LEARN** why their advice sometimes doesn't get taken;
- **REFLECT** on how people are influenced and how well they are using their influence skills to build trust with others;
- **APPLY** knowledge from the video to become a more influential advisor;
- **TEST** their knowledge of the video content;
- **STRENGTHEN** their learning through follow-up resources.

Session Leadership

Topic	Details	Slide
Section 1: ENGAGE 10 minutes	Get Your Advice Heard and Taken <ul style="list-style-type: none">• Say, "Raise your hand if you have ever given someone really good advice, only to have them not take it."• Acknowledge that, if we're really honest, we should probably all have our hands up.• Then say, "Today, we are going to explore the unexpected reason behind that."• Invite all participants to jot down a recent example of an exchange with a client where the participants' weren't as influential as they would have liked, and to keep this exchange in mind as they watch the video.	2
	What You'll Get <ul style="list-style-type: none">• Review the lesson format (learn, reflect, apply, test, strengthen).• Assert that, through this lesson, we'll learn the hidden driver of influence and how to give advice that people <i>want</i> to take. Charlie and Andrea will help us discover:	3

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	<ul style="list-style-type: none"> - The real reason our advice doesn't get taken - How people are influenced - The one skill you need to be more influential. 	
<p>Section 2: REFLECT 10 minutes</p>	<p>Tune into the Text and Subtext</p> <ul style="list-style-type: none"> • Invite participants to reflect on the key lesson from the video: <div style="background-color: #e0e0e0; padding: 5px; margin: 5px 0;"> "You have to go a step further: tune in to the text and the subtext; listen to their words and their emotions; pay attention to what they say and how they say it." </div> • Encourage discussion by asking open-ended questions, which may include the following: <ul style="list-style-type: none"> - What's challenging about applying this lesson? - What benefits have you experienced—or seen others experience—from applying this lesson? 	4
	<p>Make It Real</p> <ul style="list-style-type: none"> • Invite participants to reflect on the client situation they jotted down prior to watching the video. • Ask, "How would you apply this lesson to the client situation that didn't go as well as you planned because you didn't feel heard?" • Invite volunteers to respond, sharing your own reflection on your client situation as needed to get conversation going. • Invite participants to comment on each other's reflection and provide feedback and insight. 	6

Trusted Advisor 24 x 7: The Video Series

Topic	Details	Slide
	<ul style="list-style-type: none"> Share additional insights/thoughts only after participants have responded. 	
<p>Section 3:</p> <p>APPLY</p> <p>10 minutes</p>	<p>Four Barriers to Paying Attention</p> <ul style="list-style-type: none"> Review the Four Barriers to Paying Attention in the self-study guide, using the talking points below (from <i>The Trusted Advisor Fieldbook</i>) to support the discussion: <div data-bbox="594 674 1328 1413" style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p>A habit of talking: Most of what passes for listening is not really listening at all. Let's be honest, it consists of waiting for the other person to stop talking so that you can talk some more.</p> <p>Everyday distractions: The human brain has limited bandwidth and a finite ability to process information. Most research suggests that we get less efficient as we attempt to multi-task. Today's business environment is rife with distractions that challenge our ability to focus and be present.</p> <p>A fear of intimacy: If you are not completely confident in your ability to handle what could come out of an interpersonal exchange, you will unconsciously keep things at arm's length.</p> <p>The little internal voice: The little internal voice is the constant companion that clogs your brain with incessant chatter and, like static on a radio station, interferes with your ability to tune in.</p> </div> Assign the "take action today" homework to the group: <div data-bbox="545 1486 1328 1614" style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p>Which of these four barriers are you most prone to?</p> <p>What is one thing you will do starting immediately to get past the barrier you identified?</p> </div> Ask for questions from the group about the assignment. Make a commitment with your group about when/how you will follow up on this assignment. For example, you might begin the next group meeting by asking people to report back on the actions they took. Alternatively, you might discuss the assignment at a later one-on-one 	7

Topic	Details	Slide
	<p>session, or each group member could report back to you via email, etc.</p>	
<p>Section 3 (cont): APPLY Bonus Content 10 minutes</p>	<p>Masterful Listening: Do's and Don'ts</p> <p>Leader Note: The content in this section reinforces the lessons in the video. You may choose to deliver it, skip it, or assign it to your group as follow up.</p> <ul style="list-style-type: none"> • Before showing the Masterful Listening: Dos and Don'ts list in the self-study guide, invite the group to quickly brainstorm one or two sample dos and don'ts of effective listening. Capture their responses on a flip chart. • Share the Dos and Don'ts list from the lesson: <div data-bbox="592 898 1328 1774" style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>DO</p> <ol style="list-style-type: none"> 1. Listen for unvoiced emotions 2. Listen for what's different, not for what's familiar 3. Spot hidden assumptions (yours and theirs) 4. Let the client "get it out of his system" 5. Ask, What's that like for you? 6. Keep them talking ("What else?") 7. Let them tell their story their way <p>DON'T</p> <ol style="list-style-type: none"> 1. Interrupt 2. Match the client's points ("Oh, yes, I had something like that happen to me ...") 3. Editorialize in midstream ("Well, that option's a nonstarter") 4. Ask closed-ended questions 5. Problem-solve too soon 6. Judge them </div> 	<p>8</p>

Trusted Advisor 24 x 7: The Video Series

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	<ul style="list-style-type: none"> • Invite participants to identify one “Do” that they regularly practice and one “Don’t” that they regularly succumb to. <ul style="list-style-type: none"> – Invite participants to complete the bonus assignment as a follow-up to this meeting: – One best practice to improve listening in general; – Another to improve the client situation identified at the beginning of the lesson. 	
<p>Section 4: TEST 10 minutes</p>	<p>How Well Did You Do?</p> <ul style="list-style-type: none"> • Tell participants that you are going to test their knowledge of the content you have discussed today. • Read Knowledge Check #1, and then each of the multiple choice answers. <ul style="list-style-type: none"> – Use polling/show of hands to get participant responses. – Share the correct answer, using the talking points on the slide to provide context. – Provide encouragement when the majority of the group has answered correctly. – If there are many incorrect answers, initiate a discussion to help clarify the issue by asking people to explain how they came up with their answers. Redirect as appropriate. • Follow the same process for Knowledge Check #2 and, if you covered the bonus content, #3. 	9 - 11
<p>Section 5: STRENGTHEN 5 minutes</p>	<p>Take it to the Next Level</p> <p>Inform participants about the resources in the self-study guide where they can learn more about the topic:</p> <ul style="list-style-type: none"> • Discover what to do when you don't agree with what's being said in Chapter 6 of <i>The Trusted Advisor Fieldbook</i> (pp. 46-47). 	12

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	<ul style="list-style-type: none"> • Learn more about listening to the sequence in Chapter 11 of <i>The Trusted Advisor</i> (pp. 100-101). • Read about how to earn trust without saying a thing. • Find out why your most difficult relative will make you a better professional. <p>Optional: For additional reinforcement, invite participants to complete the Worksheet "Listening for Trust" on page 50 of <i>The Trusted Advisor Fieldbook</i>.</p>	
<p>Section 6: CLOSE 5 minutes</p>	<p>What Did You Get?</p> <p>Debrief the lesson by doing the following:</p> <ul style="list-style-type: none"> • Summarize lessons learned. • Ask for feedback. • Recap next steps. • Thank participants. 	13
<p>Total time: 55 minutes</p>		

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