


Trusted Advisor 24x7:

The Video Series

Study Guide Sample

(Lesson 07) Get Your Advice Heard and Taken

WATCH 

REFLECT

APPLY


TEST

STRENGTHEN

Have you ever given someone really good advice, only to have them not take it?

In this video, you will learn the hidden driver of influence, and how to give advice that people *want* to take. Charlie and Andrea will help you discover:

- The **real reason** your advice doesn't get taken
- **How** people are influenced
- The **one skill** you need to be more influential

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As you watch the video, think about a recent exchange with a client that wasn't as effective as you would have liked because you didn't get heard. Consider how you might apply what you are learning to do things a little differently.

Your options:

- Watch the video (3:33). 
- Watch the video and apply what you've learned (about 10 minutes total).
- Go deeper with the bonus content we've prepared for you (as much or as little time as you'd like).

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Take a moment to reflect on this critical lesson from the video:

"You have 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."

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?

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Four Barriers to Paying Attention

1. **A habit of talking.** This often comes from the perceived need to talk and look smart.
2. **Everyday distractions.** The classic example: multi-tasking
3. **The little voice.** The internal chatter you hear while others are talking
4. **A fear of intimacy.** This often comes from a concern that our client might really open up.



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Take action today:

- Which of these four barriers are you **most prone** to?
- What is one thing you will do starting immediately to **get past the barrier** you identified?

Four Barriers to Paying Attention

1. A habit of talking
2. Everyday distractions
3. The little voice
4. A fear of intimacy



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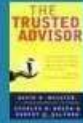
WATCH 

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Chapter 11, The Art of Listening, pages 104-105
Masterful Listening: Do's and Don'ts

B
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DO

How often do you practice these?

| | Rarely | Sometimes | Often |
|---|-----------------------|-----------------------|-----------------------|
| 1. Listen for unvoiced emotions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 2. Listen for what's different, not for what's familiar | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3. Spot hidden assumptions (yours and theirs) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4. Let the client "get it out of his system" | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 5. Ask, What's that like for you? | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



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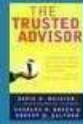
WATCH 

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Chapter 11, The Art of Listening, pages 104-105
Masterful Listening: Do's and Don'ts

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Continued...


DO

| | Rarely | Sometimes | Often |
|--|-----------------------|-----------------------|-----------------------|
| 6. Keep them talking ("What else?") | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 7. Let them tell their story their way | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



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BONDS


 Chapter 11, The Art of Listening, pages 104-105
Masterful Listening: Do's and Don'ts

DON'T

How often do you succumb to these?

| | Rarely | Sometimes | Often |
|--|-----------------------|-----------------------|-----------------------|
| 1. Interrupt | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 2. Match the client's points ("Oh, yes, I had something like that happen to me ...") | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3. Editorialize in midstream ("Well, that option's a nonstarter") | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4. Ask closed-ended questions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 5. Problem-solve too soon | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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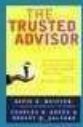
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BONDS

 Chapter 11, The Art of Listening, pages 104-105
Masterful Listening: Do's and Don'ts


Continued...

DON'T

| | Rarely | Sometimes | Often |
|---------------|-----------------------|-----------------------|-----------------------|
| 6. Judge them | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Take Action:

- Select one best practice to **improve your listening in general.**
- Select another to **further improve your client situation.**

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1. Reciprocity, one of the six principles of influence, is the returning of a gesture. In what form does it play out in advice giving?

- Asking lots of questions
- Offering advice in return
- Listening attentively
- Sharing information candidly



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1. Reciprocity, one of the six principles of influence, is the returning of a gesture. In what form does it play out in advice giving?

Correct

Yes! Listening attentively is the correct response.

Continue

- Sharing information candidly



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2. Influence is a function of rational decision-making.

- True
- False



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The "why" behind the answer:

Most of us assume influence is a form of rational decision-making: a process of accumulating facts, applying logic, and revealing "the truth".

In reality, according to psychologist Robert Cialdini, there are six principles of influence, not one of which has anything to do with rationality and logic.



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The "why" behind the answer:

Masterful listeners are responsive, yet willing to give others time to think and tell their whole story. They know to pay close attention, and not to interject too quickly.



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(Optional, for those who completed the bonus content)

3. Which of the following is NOT a best practice of masterful listeners?

- Responding immediately
- Let the client "get it out of his or her system"
- Asking, "What's that like for you?"
- Listening for what's different, not for what's familiar



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- Discover what to do when you don't agree with what's being said in Chapter 6 of *The Trusted Advisor Fieldbook* (pp. 46-47).
- Learn more about listening to the sequence in Chapter 11 of *The Trusted Advisor* (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](#).



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