Becoming the Trusted Advisor

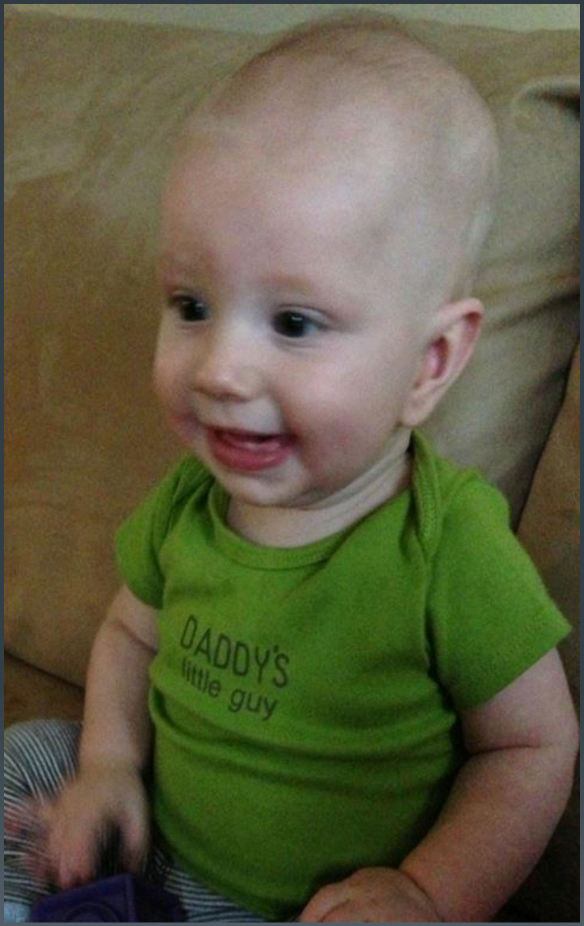
Department of Human Resources

August 5th, 2014

Mindsets, Strategies and Skills for HR Leaders

Why This? Why Now?

FIRST, THE GOOD NEWS



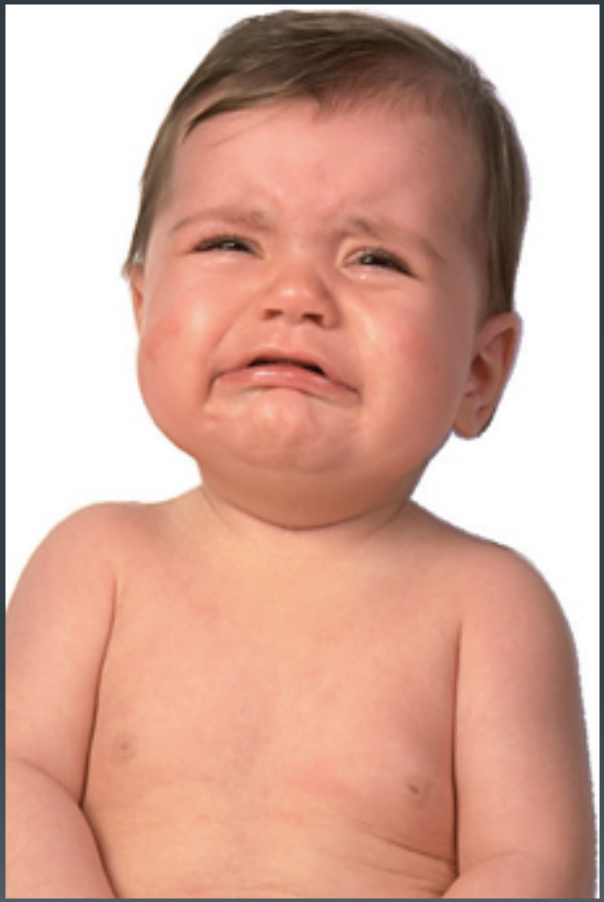
70 percent of CEOs want HR's involvement at the highest levels of planning.

Source: *Economist Intelligence Unit survey, May 2012.*

56 percent of CEOs reported that insufficient talent within the organization is a key challenge.

Source: *Economist Intelligence Unit survey, May 2012.*

AND NOW, THE BAD NEWS



Only 48.9% of executives (Non-HR) trust their own HR department.

Source: Chart Your Course International, 2008

37% of CEOs have doubts whether HR has the business knowledge to participate productively in solving the talent shortage.

Source: Chart Your Course International, 2008

AND LINE MANAGERS SAY…

40% find Google to be a better source of information than their HR team.

50% said they don't get adequate support from HR to be a good manager

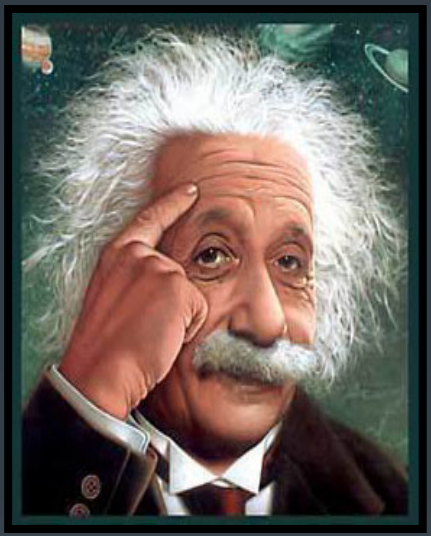
40% say that HR actively blocks them from making decisions themselves.

50% think that their HR team is slow to respond to requests.

WHAT THE CEO NEEDS FROM HR

- Talent management and succession planning
- Creating the employment brand
- Four generations in the workplace
- Employee communications
- Social media
- Trend analysis and forecasting
- Change management

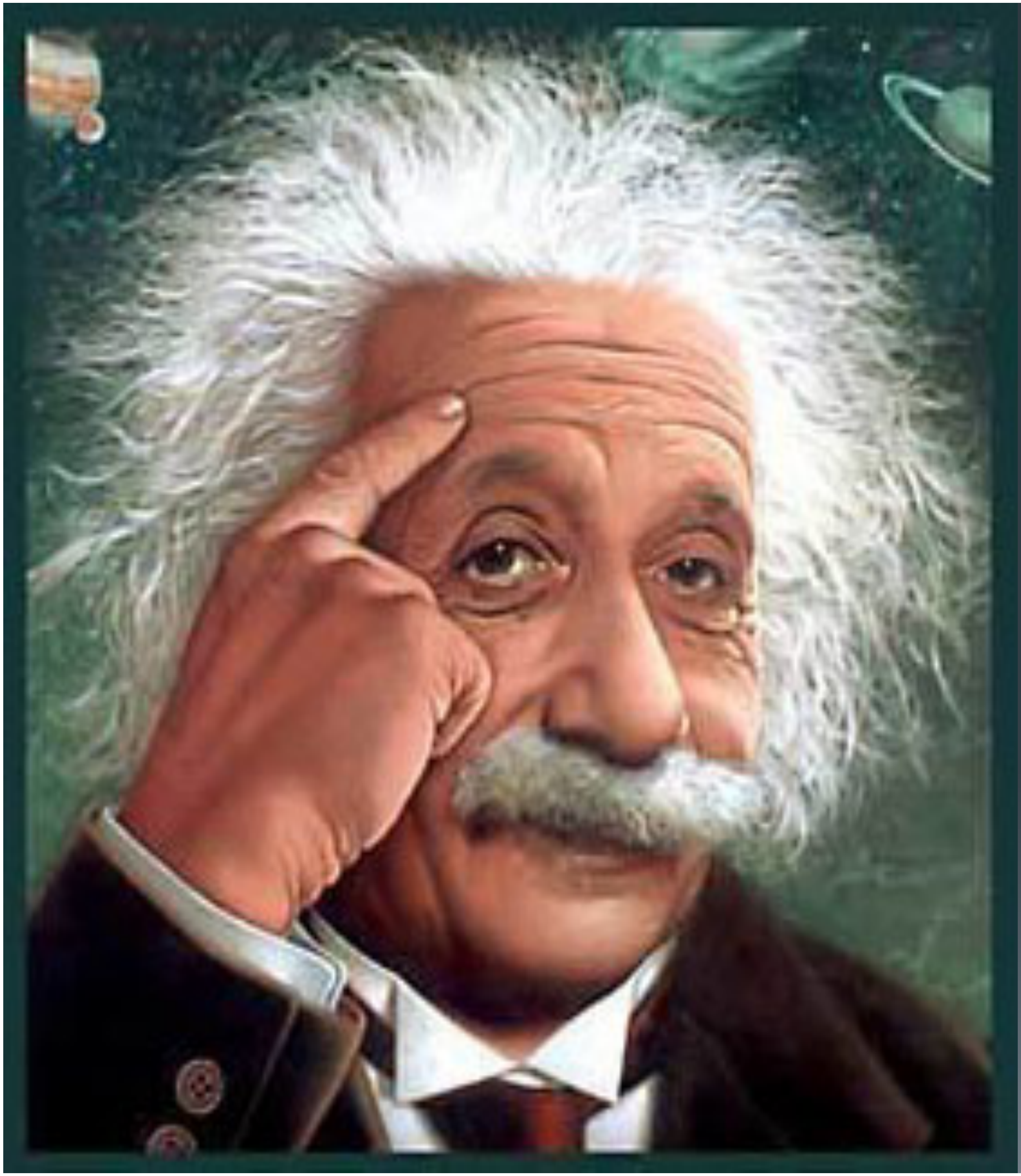
Today’s Agenda



Mindsets

Strategies

Skills

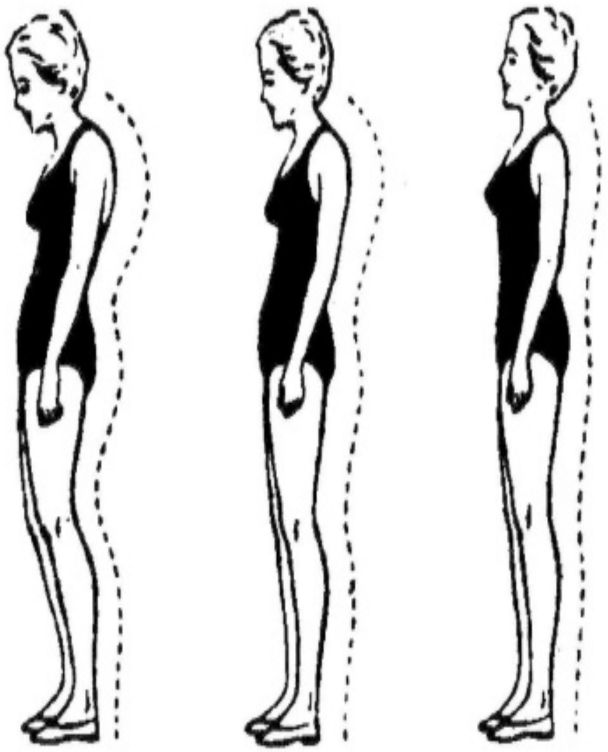


Part 1: Mindsets

“We cannot solve our problems with the same thinking we used when we created them.“

Albert Einstein

What's your posture?



1. Standing
Stand tall with feet apart and equal weight on each leg. Look straight ahead and lift chest up. Tighten abdominal muscles to maintain a comfortable (neutral) position of the back. Keep knees relaxed.

The Bag Carrier


The Compliance SWAT Team


Tell me about your mother...

Peter Block: 3 Basic Consulting Postures

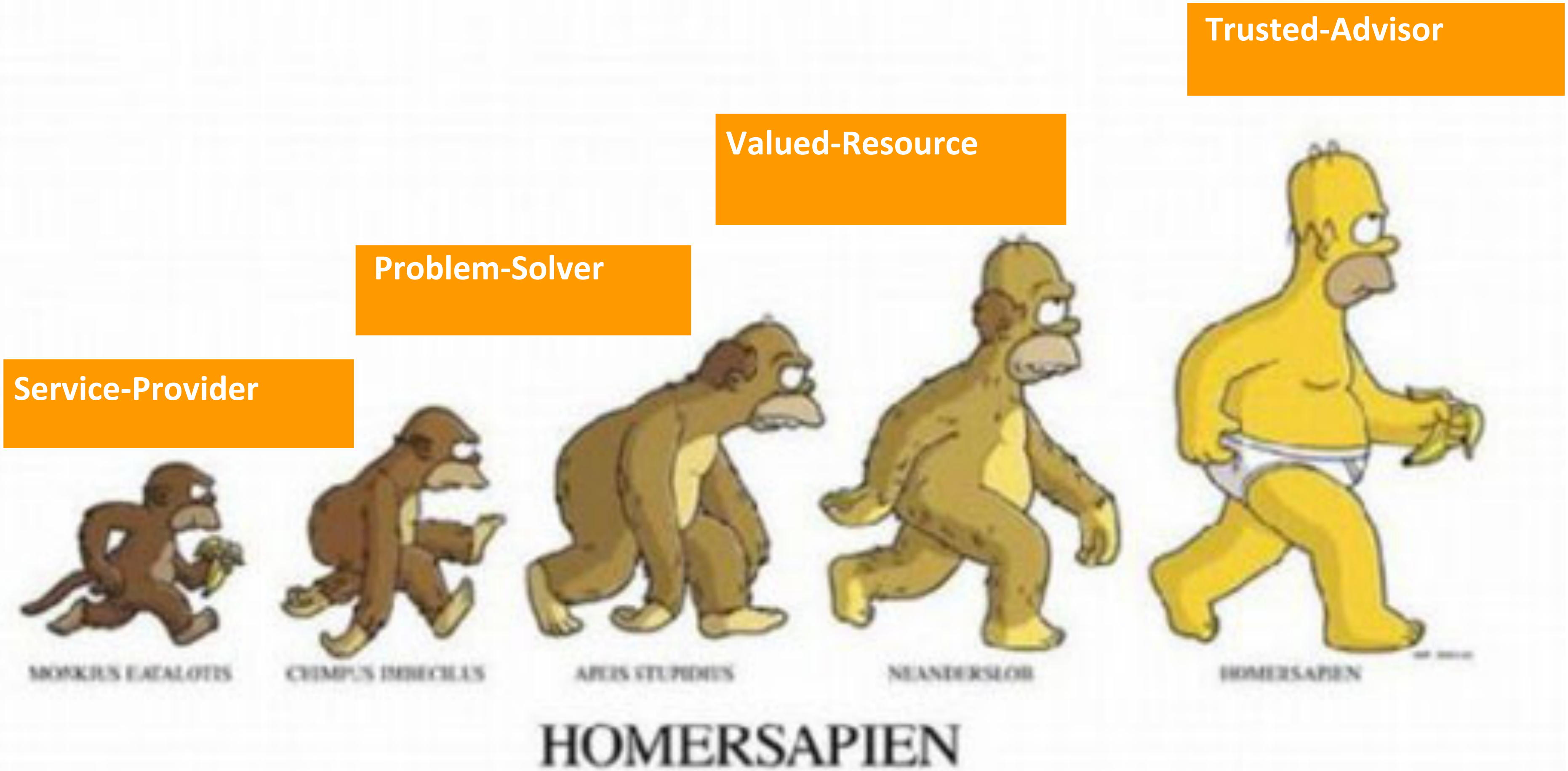
Expert

Pair of Hands

Collaborative

Peter Block's *Flawless Consulting*, pp. 21-27,
based on Ed Shein's *Process Consulting Revisited: Building the Helping Relationship*.

Maister Et. Al: A Continuum of Expert Postures



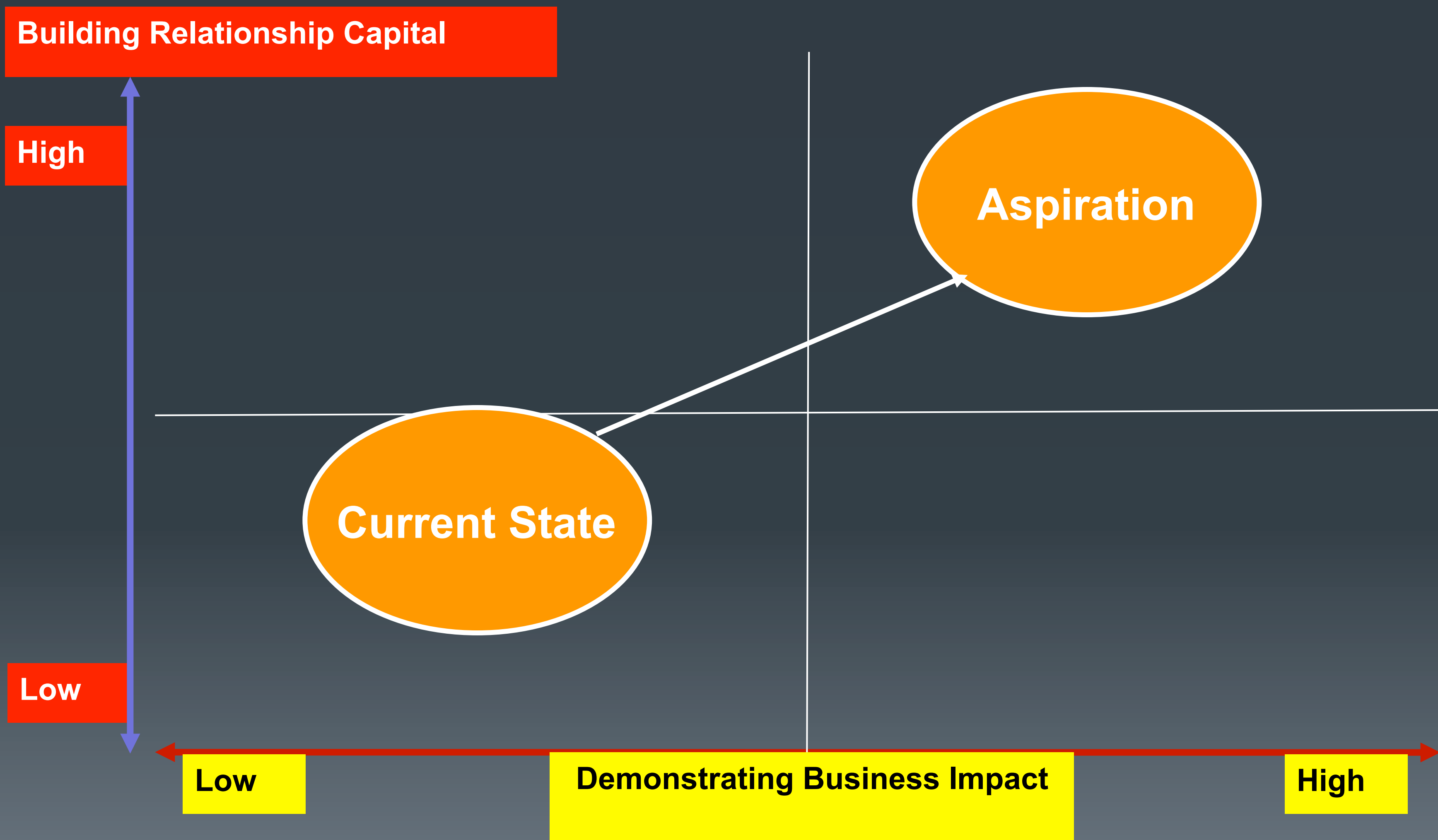
Reflection: "Checking Your Posture."

- Circle the statements that most describe your posture with your clients
- Share with a partner

Part 2:

Trusted Advisor Strategies for HR Leaders

Strategy 1: Build Relationship Capital & Demonstrate Business Impact



Activity:

- In your workbook, note a client relationship that is very important to your future success.
- Answer the question, “Where is that client today on the 4-box matrix of Relationship Capital and Demonstrated Value?”

Understanding Relationship Capital

THE TRUST EQUATION

$$\frac{(\text{CREDIBILITY}) + (\text{RELIABILITY}) + (\text{INTIMACY})}{(\text{SELF-ORIENTATION})} = \text{TRUSTWORTHINESS}$$

C.H. Green

Strategy 2: Build your executive presence

What behaviors create or diminish executive presence?

Group A: At Table Groups

(my left)

What behaviors create executive presence?

Group B: At Table Groups

(my right)

What behaviors diminish executive presence?

Really busy detailed slide on research findings on behaviors for executive presence *(London Business School)*

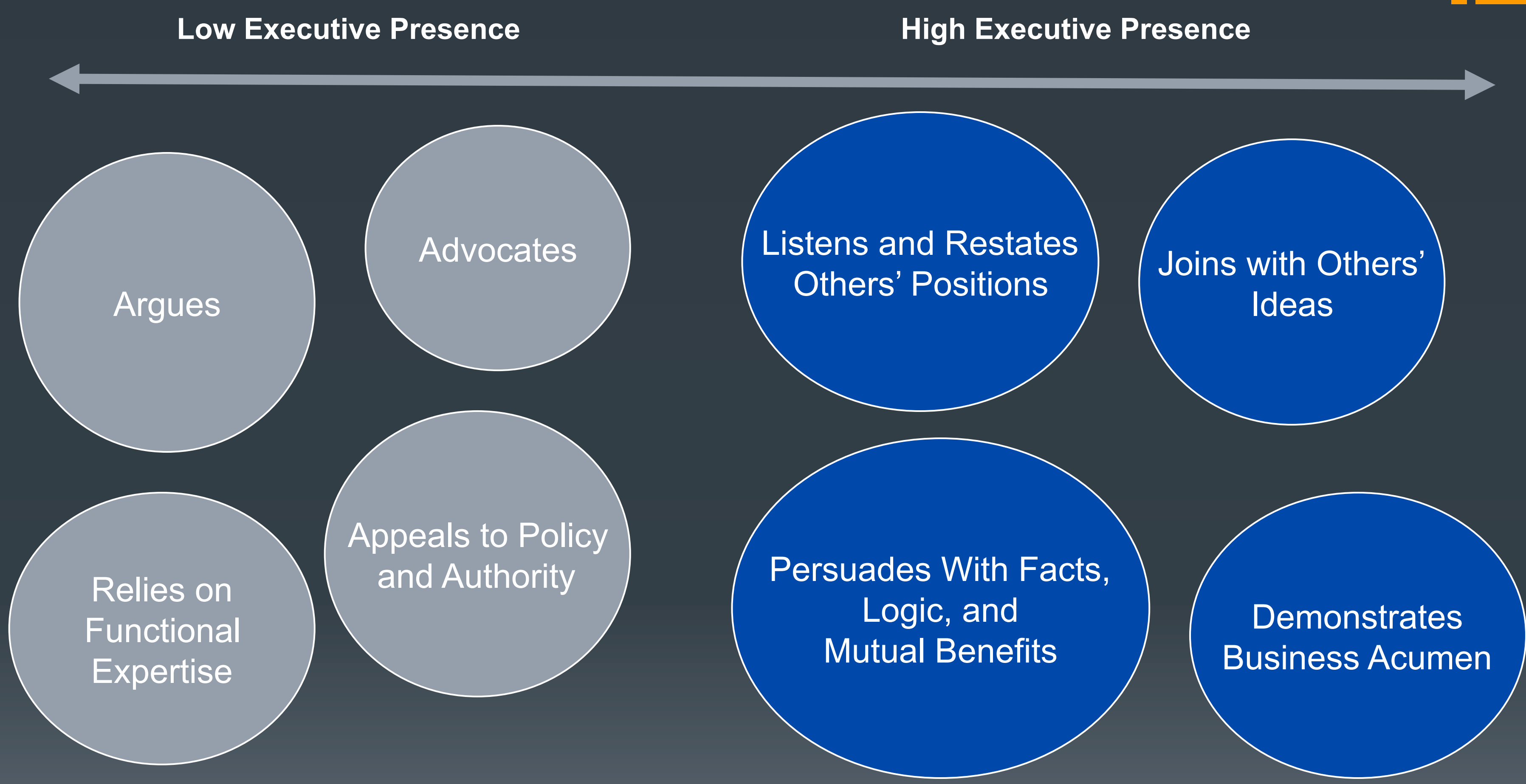
Low Executive Presence

- Advocates & Argues
- Attacks others' positions
- Wordy
- Vacillates
- Hidden agendas -- cagey
- Personal attacks or threats/bullying
- Fails to support positions with facts
- Over-depends on facts & logic, misses relational and political factors.
- Assumes others should defer to their expertise
- Expects others to defer to their rank/authority
- Appears stressed or upset
- Seeks to "win" against rivals
- Capitulates, acts the victim, sulks
- Inconsiderate of others' needs
- Over-persists in disagreement
- Over-relies on functional expertise

High Executive Presence

- Listens and restates others' perspectives
- Clearly and succinctly states own point of view after hearing others
- Joins together perspectives of others, and own to others
- Supports positions with facts, logic, examples
- Connects benefits of proposals to needs of others
- Facilitates team come to agreement
- Looks for synergistic solutions
- Makes others feel confident about the organization and themselves
- Forms alliances and partnerships
- Builds relationships
- Looks for mutual benefit
- Supports the team decision once made
- Knows the business, demonstrates acumen

Summary of Research Findings



Courage and Credibility

High

Credibility to be Heard

Low

Confluent:
- Goes along with majority
- Lacks influence
- Fails to express own truth if it might offend.
- Expresses agreement
- Expresses understanding

Influential:
- Wins the right to be heard
- Connects first with others' points of view
- Expresses own perspectives in ways that will be heard
- Has expertise, business acumen, and advisory skills.

Silent Witness:
- Knows something the team needs to hear, but doesn't speak up
- Leaves others uncertain about point of view

Outspoken Maverick:
- Speaks up but isn't heard
- Fails to connect to others' points of view
- Aggressive advocacy
- Combative or Argumentative
- Passionate

High

Courage to Speak Up

Strategy 3: Be Intentional

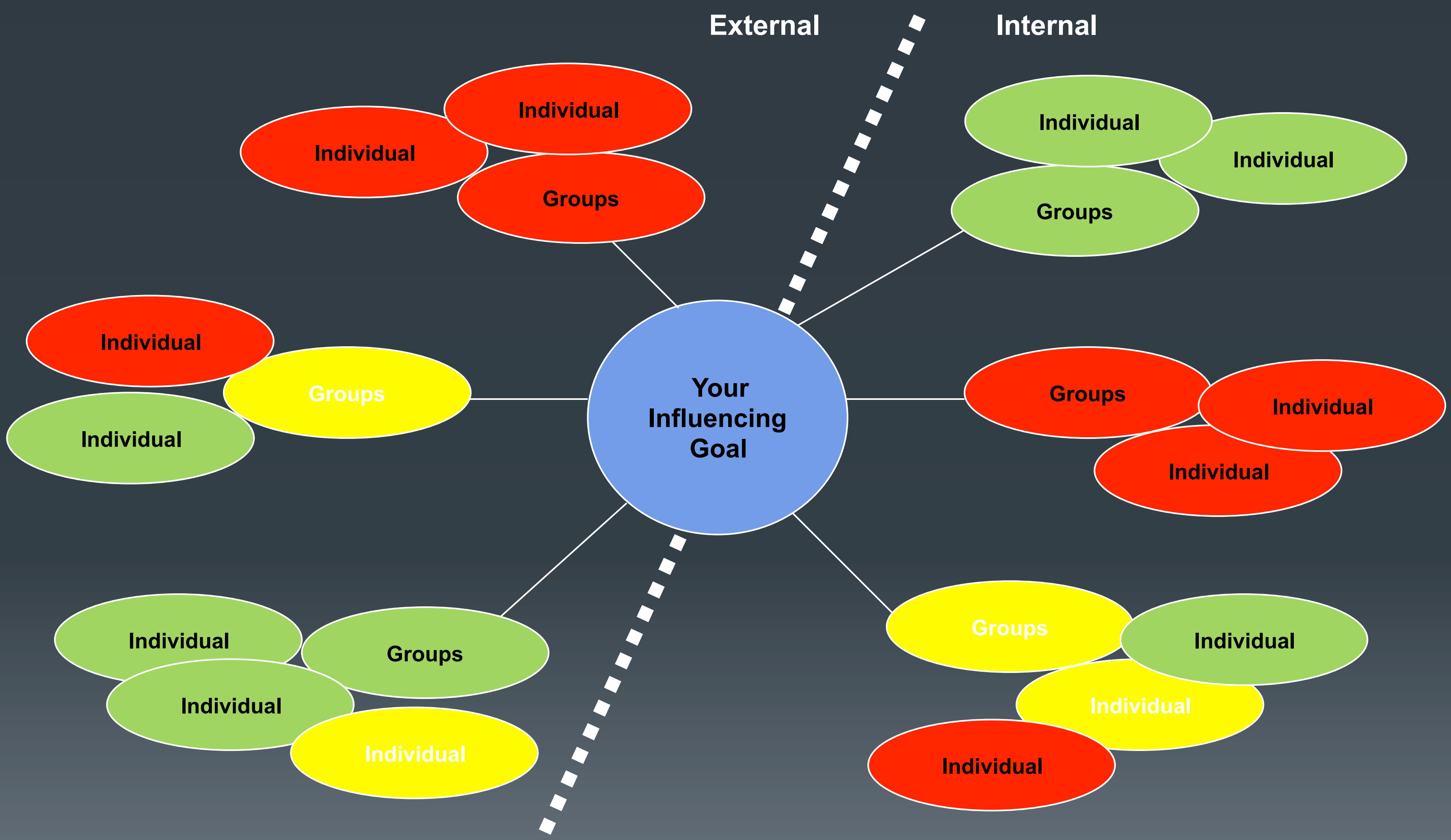
The 5-Step Influencing Plan

1. What's your influencing **goal**?
2. **Who** do you need to influence?
3. What are their **needs**, interests, & communication styles??
4. What influencing **strategy** will be most effective?
5. How can I **"show up"** in a way that builds Credibility?

Job Aide: Influencing Plan Template – Workbook Page 10

	Plan of Action
Influencing Objective:	*What do you want to accomplish?*
Key Stakeholders	*Who are the most important people involved?*
Key Stakeholder Social Styles	*What are their styles?*
Key Stakeholder Needs & Interests	*What is their point of view? What are their needs?*
Best Influencing Approaches	*Which influencing strategies would be most effective in this situation? (Will vary by stakeholder!)*
Ways to Build Executive Presence & Credibility	*How can I influence in a way that raises the credibility of my role?*

Job Aide: Stakeholder Map Template
Who do you need to influence?



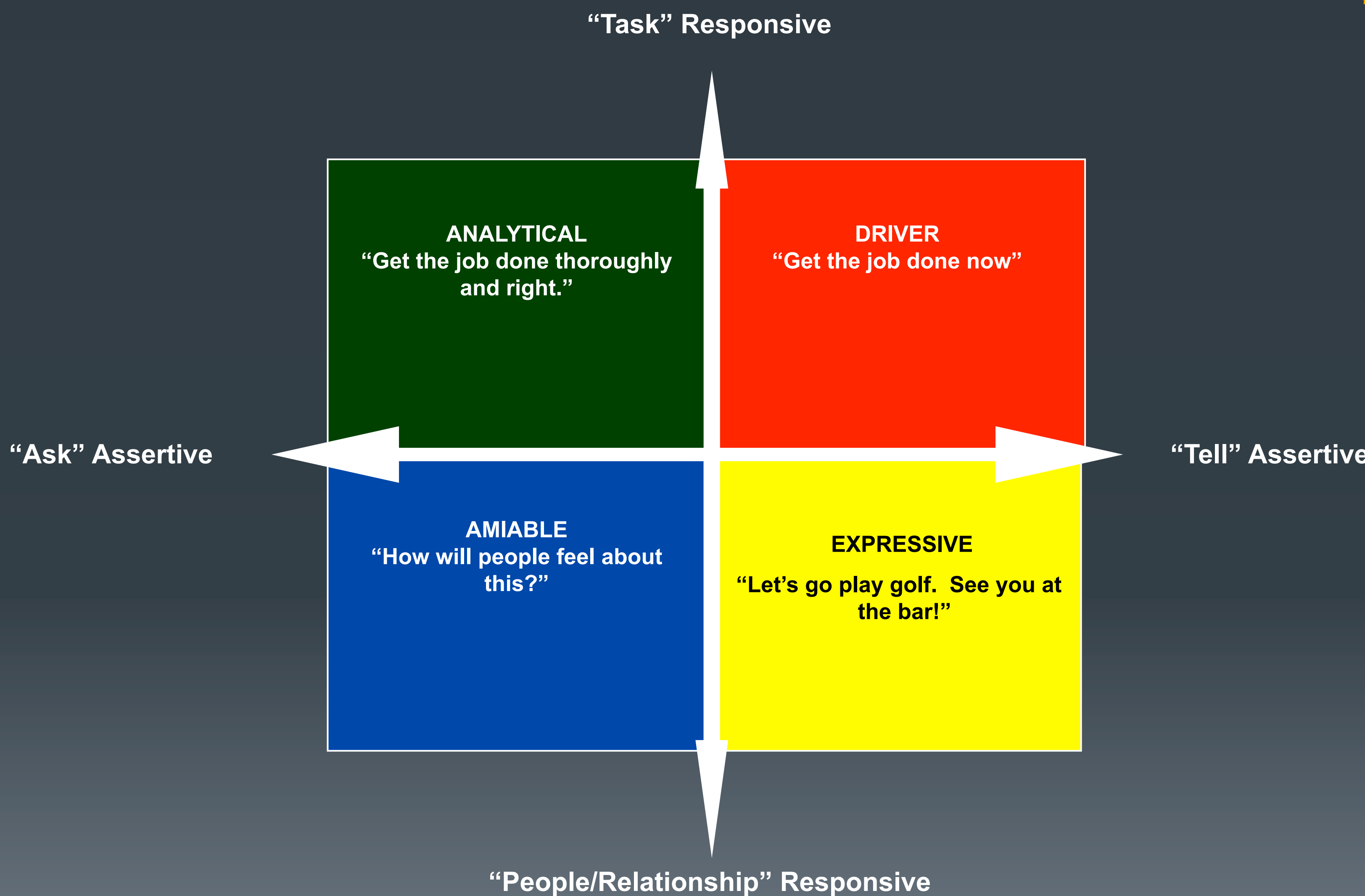
OPPOV

Influence from the **Other Person's Point of View**

- What are they rewarded for?
- What are they motivated by?
- What are they afraid of?
- What am I doing to make things worse?
- What could I do to make things better?

Carol Keers & Thomas Mungavan, "Seeing yourself and others do: authentic executive presence at any stage of your career."

Tool: Bolton & Bolton Social Styles
Influence Comes from Understanding Others



David Kipnis' 7 Influencing Strategies

Pull Strategies

- Reason
- Friendliness
- Coalition
- Bargaining

Push Strategies

- Assertiveness
- Higher Authority
- Sanctions

Reference: Dr. Robert Cialdini: 6 Influencing Strategies from the Science of Persuasion

Liking	Commonality
Reciprocity	Repaying a debt of gratitude
Social Proof	Safety in numbers
Consistency	Following through on public commitments
Authority	Credibility from outside experts
Scarcity	People want what they cannot have

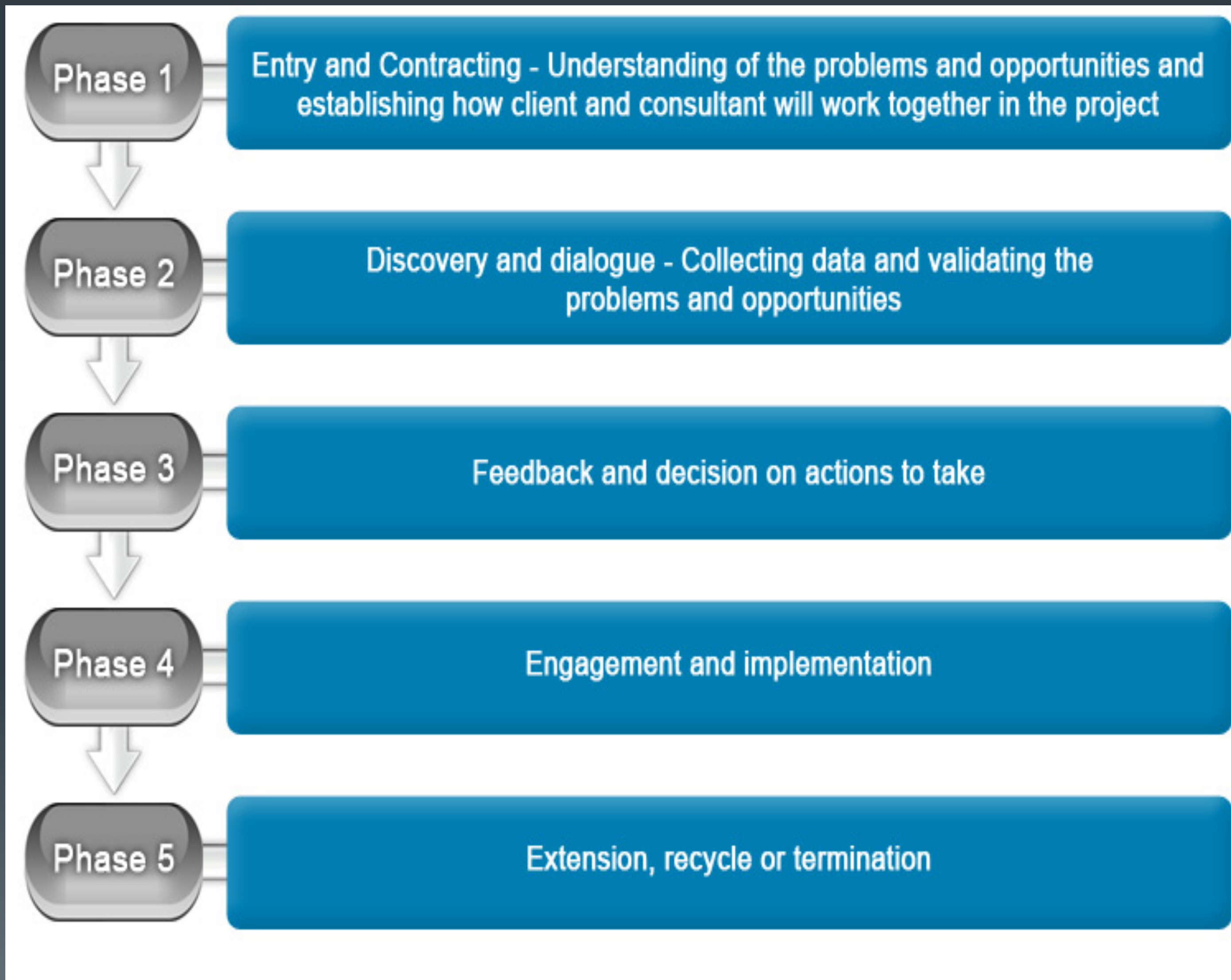
Summary: Effective influencers...

1. Build Relationship Capital and Demonstrate Business Impact
2. Demonstrate Executive Presence
3. Exercise Influence with Intention

Part 3: Trusted Advisor Skills

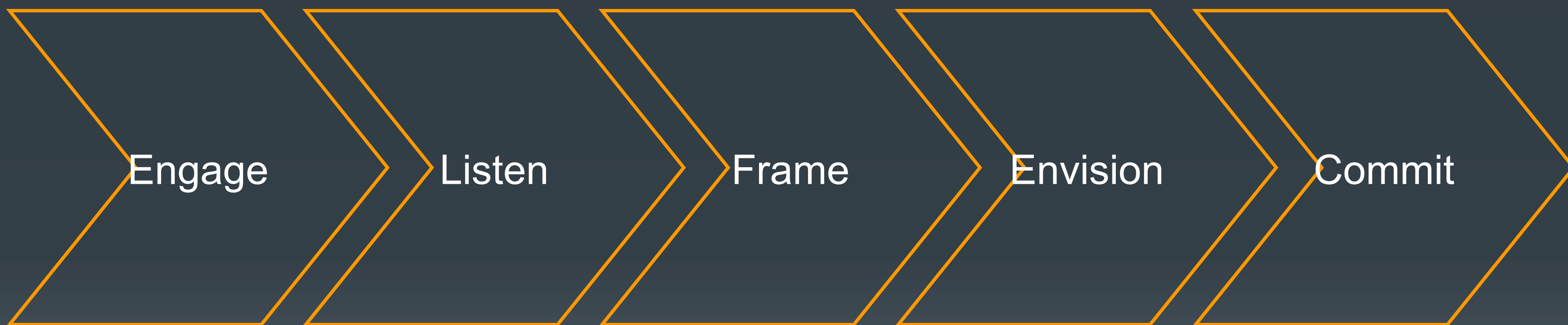
Consulting Conversations

Follow a Disciplined Consulting Process



Peter Block, Flawless Consulting

Entry and Contracting Using The Trust-Building Process: C.H. Green



3 Job Aides

- Client Knowledge Checklist
- Pre-Meeting Prep Sheet
- 5 Ways to be More Influential in Meeting Reminder Sheet

Client Knowledge Checklist

- What is the client’s delivery model and strategic plan?
- What are key risks leaders are worried about?
- What is the overall finance strategy?
- What must people learn to do differently or better to achieve the plan?
- What’s the history with the presenting issue?
- What approaches have been tried already? What was the result?
- What existing suppliers, internal and external, have been involved so far?
- What do you already know?
- What else do you need to know?
- What internal and external resources are available to build knowledge?
- Who in your personal and professional network can help you gain insight into the individual and situation?

Client Meeting Checklist

Objectives: What do I want as an outcome from the meeting?

Rapport: Who needs to be in the room from the client? Who are the decision makers and influencers? What are points of connection with the players?

Anticipate Needs: What are their concerns and opportunities?

Anticipate Solutions: What solutions will we prepare to present? What materials could Marketing help us prepare? Who can help you prepare?

Anticipate Objections: What legitimate concerns are they likely to raise? What are more subtle issues and resistances?

Prepare to Close: How can we ask for what we want? (Test, Trial, Ask)

Follow-Up: What are next actions? Who has the actions? What can we send in writing? Who should be in the next meeting? Who do I need to inform about what I heard?

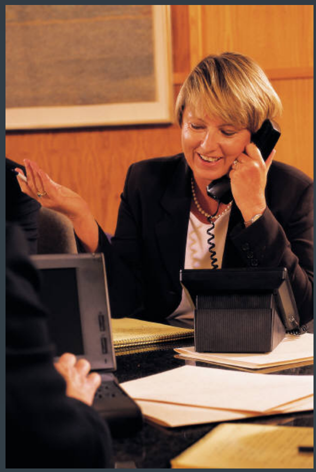
5 ways to be more influential in meetings.

1. Prepare your Mind:
   - Accept that you cannot control the outcome
   - Focus on the ultimate objective – improving the situation
   - Be willing to be influenced
2. When you state your point of view, state is crisply and simply
3. Spend the majority of your time listening
4. When it's your turn to speak, first connect to what other's have said
5. At the close, summarize the outcome

The Trusted Advisor Fieldbook, Green and Howe, p.19

4 Core Conversational Skills

1. Listening – Building rapport and connection, perceiving both content and emotion
2. Questioning – Discovering needs, challenging client's existing thinking and guiding the conversation
3. Presenting Persuasively – Presenting solutions with impact, influencing the client as a Trusted Advisor
4. Winning Commitment – Closing on next actions, driving towards tangible results



Every client conversation is a combination of these four elements.

The R.E.L.A.X. Model for Consultative Conversations

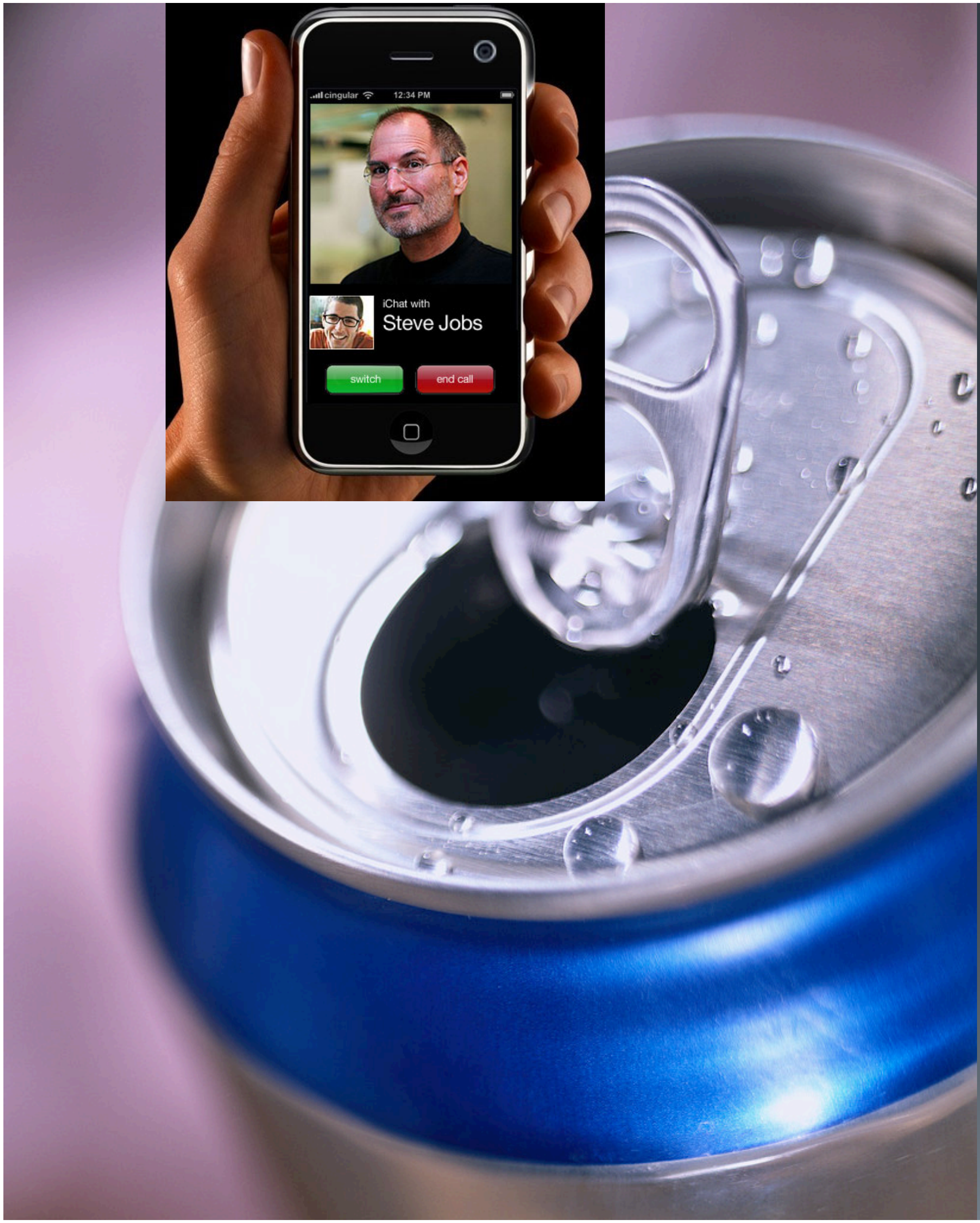
R. **REALLY LISTEN**

E. **EMPATHIZE**

L. **LOOK FOR DATA**

A. **AGREE ON ACTION**

X. **EXIT WITH PURPOSE**



R: Really Listen

"Give whatever you are doing, and whoever you are with, the gift of your full attention."

Jim Rohn

E: Empathize

Tell me more...

Sounds like...

L: Look for Data

Get the facts and probe for real needs and real root causes.

Discovering real needs

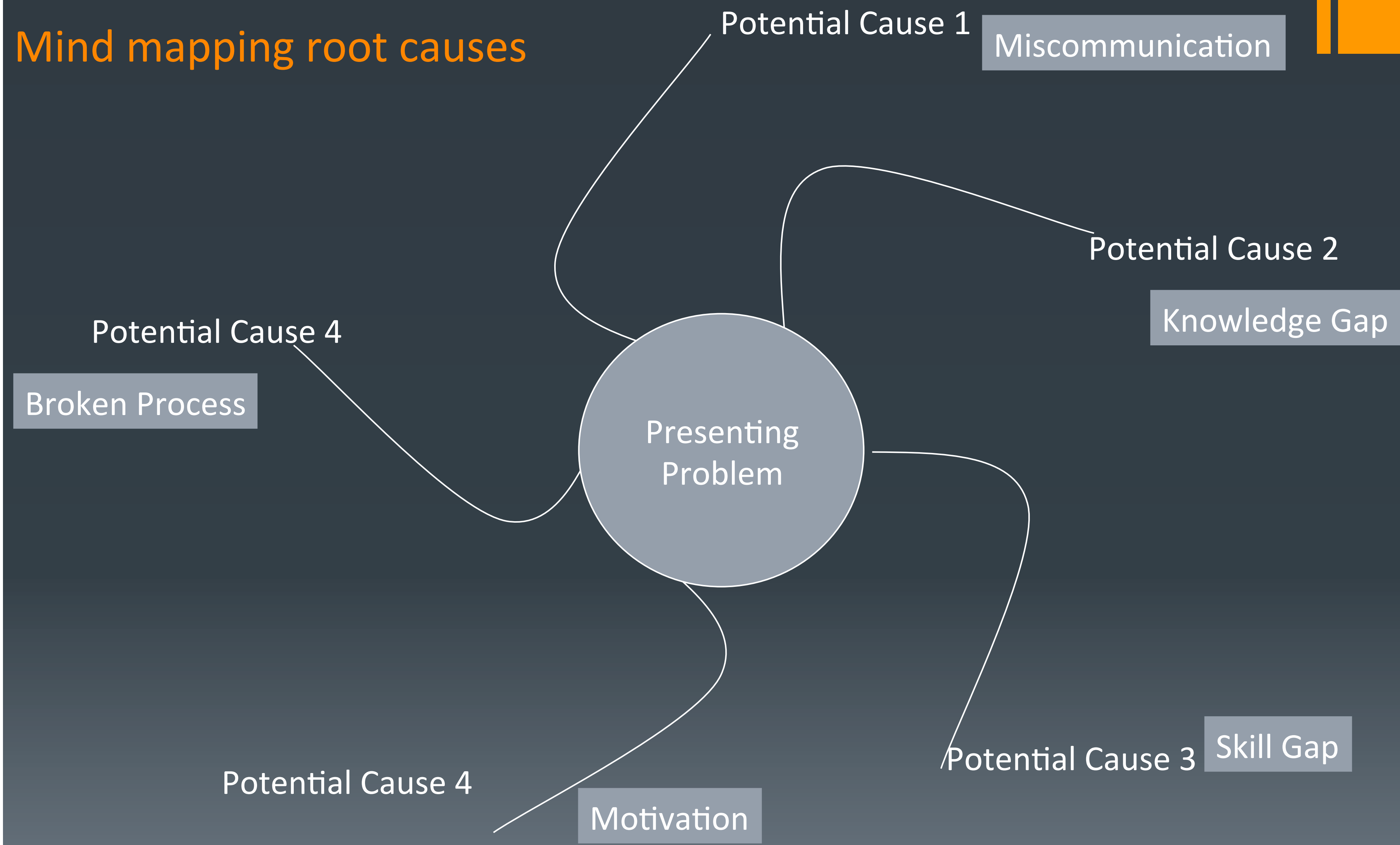
Presenting Problems:
The face-value request, or description of the problem. Sometimes with a "solution" attached.

Felt Needs:
Concerns in the mind of the client that motivate the request for help, and openness to listen.

Real Needs:
Root causes that if addressed actually improve the client's condition.

Peter Block, Flawless Consulting

Mind mapping root causes



Three Roots Causes of Resistance

Root Cause 1–
I don't **understand** it.

Strategy:
Clarify & simplify

Root Cause 2–
I don't **like** it.

Strategy:
Discover real issues

Root Cause 3–
I don't **trust** you.

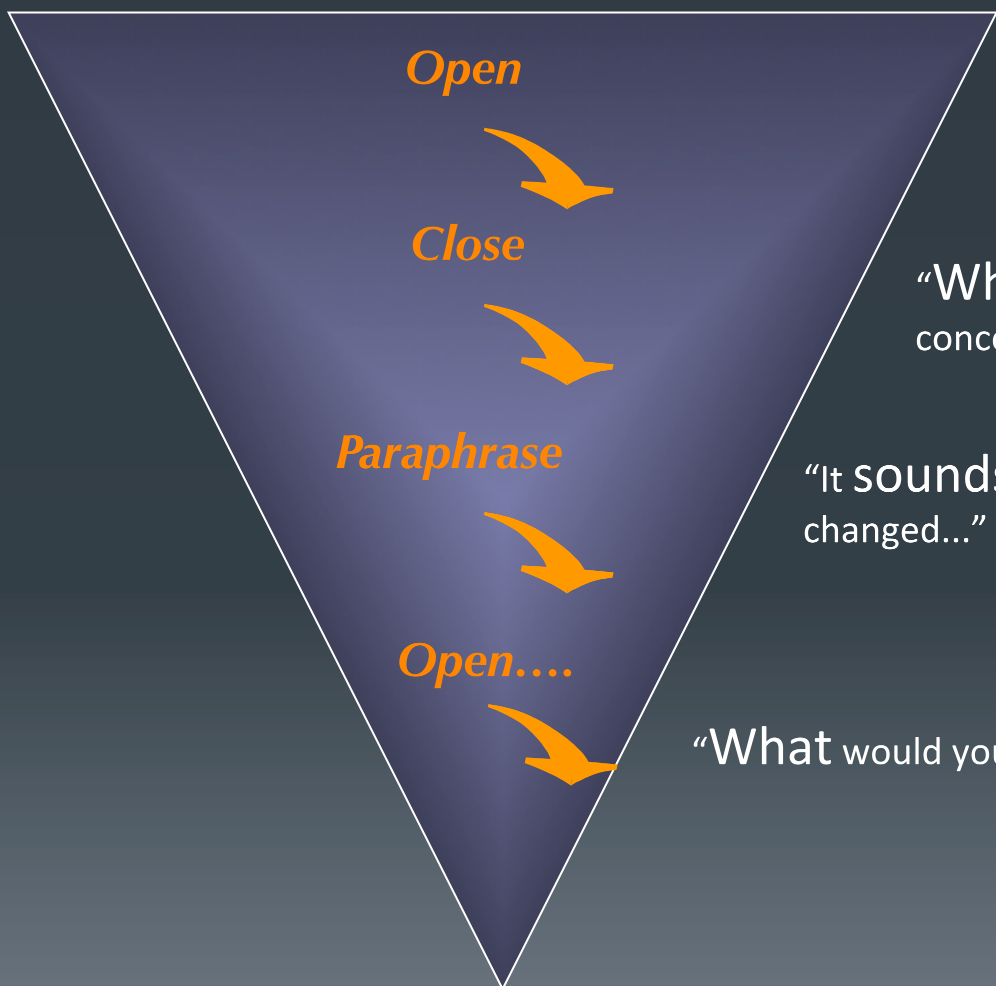
Strategy:
Build relationship capital

Try to understand the real root cause.

*Rick Maurer

The Questioning Funnel

The Funnel Approach



"Tell me more about the issue you ran into."

"What have you tried so far to address those concerns?"

"It sounds like you're cash flow situation has changed..."

"What would you like to see happen next?"

"What else?"

A: Agreeing on Solutions:

Problem Solving & Agreeing on Next Steps

Ask for and offer solutions

- What ideas do you have?
- I have some suggestions…would you me to share some ideas for your consideration?

Winning Commitment
TEST TRIAL ASK

Test… Reconfirm the basis of agreement

- "So it sounds like the issue is staying in compliance while changing your capital structure."

Trial…Offer a next step

- "As a next step, how about we prepare some draft recommendations for review?"

Ask…for the action you want

- "Could we set up a time to discuss options at the end of the month?"

X: Exit with purpose and support

- Leave the door open for the next conversation
- Give support...honor and affirm what's working:
  - "You're making real progress on adapting your cash flow strategy to faster growth."
  - "You're well organized and have a clear picture of what you need."
- Set up the next meeting.