

5 Steps to Become a Trusted Advisor



Scale Your Sales

Janice B Gordon

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Maya Angelou, the late great poet, and wordsmith, said, ***'People do not remember what you said; they remember how you make them feel'***. People buy on emotion and justify with logic – if there is no emotion, they will not buy, and the way we work has moved more to build and nurture relationships.

I worked with a publishing company, global sales managers who could not understand why new incumbents like Pearson's were winning deals. Cambridge University Press had the pedigree as one of the oldest publishing companies, a global English language certification, University and more. The sales team had got used to selling books to the ministry of education and regional educations boards and schools. The problem was that they were selling. Instead, I got them to ask questions to understand their customer problem and to co-create solutions. Many of the solutions involve hardware devices and software; some solutions were bespoke to the customer needs. Finally, the customer was listened to and felt valued. Within nine months, the sales team increase their revenue by over \$6 million.

Experience Sells: The experience you give your customers add value to the bottom line.



Becoming a Trusted Solution Advisor is delivering the experience your customers and buyers want.

What is a Trusted Advisor?

It is to be viewed – and sought out – as a source of valued advice and support. When the Huthwaite Group studied client's perceptions of professional service salespeople, they found that all of the critical elements of trust featured highest (in the client's words: candour, competence, and concern). The areas of showing concern and empathy for their clients.

Why is this Important?

Edelman Trust Index states that trust is at an all-time low. Customers who have a transactional relationship with the sales representatives give the company 14% of their available business on average. Still, the percentage jumped to 47% if they perceived the salespeople to be trusted advisors. If you have a trusted relationship, you can shape the customers' thinking, influence, and have more sustainable relationships and sales.



The Top Five Characteristics of a Trusted Advisor:

1. Credibility

A trusted advisor must be credible. Credibility is built on knowledge, expertise, and professional and personal networks. Knowledge and expertise are gained through education (learning, training, professional development) and practice in a particular field. Credibility is built when the Advisor can put themselves in their shoes.



2. Ability to Establish and Maintain Lasting Customer Relationships.

Relationships are the backbone of a business. Having excellent client relationship management is key to success for companies. Customer service excellence is a great start. Make sure you get consent to follow up with you and are open to communicating in their preferred method (email, phone, texting, etc.).

3. Ability to Do Something Extra for the Client

The Trusted Advisor's responsibility is to listen carefully to the client and ask questions to ensure you understand their unique wants and needs.

4. Ability to Manage Client Expectations

The client does not only trust the Trusted Advisor: having a solid, trustworthy network of knowledgeable and competent professionals to draw on but having well-researched resources available is critical. A trusted advisor will refer a client somewhere else if they cannot offer you what you need and wants.

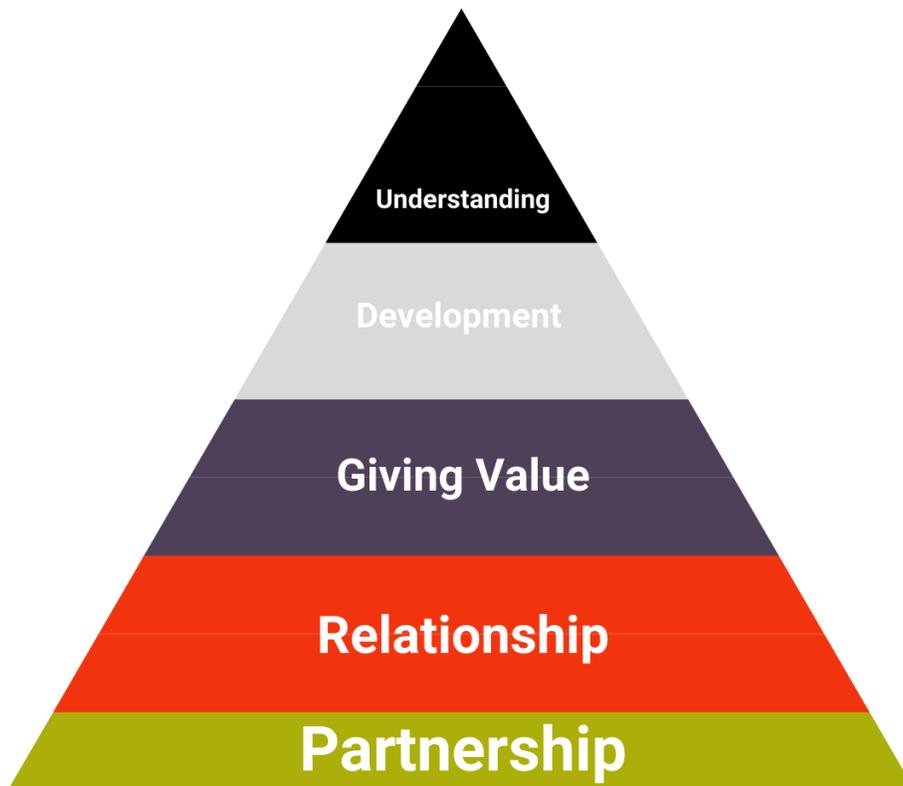
5. Ability to Retain Customers



Before embarking on the conquest of new customers, successful companies must be able to retain existing customers. Customer retention includes being able to deal with demanding clients. Negotiate challenges. The trusted Advisor keeps the door open for future follow-ups to win back and gain recommendations and referrals.

Scale Your Sales 5 Steps to Becoming a Trusted Advisor.

1. Build a deep understanding of your client world and business better than them.
2. Develop your environmental and business acumen
3. Earn the right by giving value always
4. Establish a trust-based relationship by delivering on your promises.
5. Elevate your relationship into a partnership, both internal and external.



Scale Your Sales 5 Steps to Becoming a Trusted Advisor.

1. Build a deep Understanding of your Client World and Business better than them.

What are they most concerned about? Stephen R Covey & Habits of Highly Effective People, habit 5 is Seek First to Understand, Then to Be Understood. How you treat prospects sends a strong message of how you treat your clients. Using your active listening skills, for example, not to gather ammunition for our next verbal gem – but to build a genuine and deep understanding of a customer's pleasure and prioritise stresses and strains.

The onus is not just on the salesperson but supported by the whole customer-centric organisation, which focuses on helping sales by uncovering and delivering unmet needs.

Make Each Colleague a Mini-Researcher

Colleagues who interact with customers know your customers best and should be your prime data gatherers and interpreters. Use them by asking their input, focus them on gathering information as part of their role, and even assigning them specific information collection tasks.

Social listen and Pay Attention to Social Media.

Monitoring what people say on social media and keep in mind that people do not interact online the same way they do in person. It is another source of data to gather a 360 or 3D view of the customer connections and world view.

Executives, Managers, Supervisors Should Interact Face to Face with Customers

Those making decisions in the company must regularly interact with customers. Talk with them face to face. Serve them. Hear their opinions and "read" their emotional reactions.



2. Develop your Environmental and Business Acumen

Understand what is coming next that will help or hinder the client's business. Being able to offer sound advice across a broad range of issues, not just in your specialism, makes you an indispensable partner, not just another vendor.

Talk to as many of the stakeholders, influencers and colleagues in the customer's world and universe. You need for understanding the critical factors behind issues related to a particular business action and the ability to comprehend the consequences of specific actions. It is the ability to pick the right reactions and actions in complex situations and understand how different parts of a business relate to each other.

When I am consulting with clients, I often ask myself, what is my role here? To advise, to connect people or the dots, to support, to direct, to listen, to reflect, to clarify, to step back, to strategize, to ask open questions, rarely is my role to sell.



3. Earn the Right by Giving Value always.

Trust does not grow overnight and is lost in seconds. Never rush to answer or close. Every interaction with your clients is a chance to either advance their perception of you as a source of valuable insight or not. Gary Vaynerchuck named his book: Jab, Jab, Jab, Right Hook; I say, give, give, give, and ask permission.

Give relevant and timely value, and make it engaging.

Value changes depending on the stages of the buying journey. If the buyer is researching, you must create awareness with information to help them with what they need to know to move forward in their buying journey.

Create Awareness

Publish content.

The most direct way you can establish your expertise is to publish content on platforms that your buyer search. Think about the questions your prospects most commonly ask and the problems they most frequently face; then answer those questions through blog posts.

Answer Questions on Social Media, in Industry Groups or Relevant Forums.

Devote 20 minutes a day to finding questions to answer on these channels and posting helpful answers, following industry conversations on platforms like Twitter and LinkedIn that your customers commonly use. Do not post promotional content or product-specific information; instead, choose content that demonstrates thought leadership and your expert knowledge.



Consideration

When considering whom to shortlist, buyers need more specific value-adding answers to targeted questions.

Provide Prospects with How-to Blog Posts.

Send or share blog posts that are super-specific to their problem. Respond to questions by pointing them toward your company details answers or invite them to a consultation (not a sales) call.

Send Prospects to Gated Offers or Webinars.

Suppose you have been building the connection and conversation for a while. In that case, the Consideration stage is an excellent time to begin directing the prospect toward gated pieces of content, as long as it is hyper-relevant to the problem they want to solve. Specificity is vital; wasting buyer time is the quickest way to losing a decision.

Offer a Consultative Call, not a Sales Call.

Do not say a word on this call about your product or offer your services in a sales capacity until you have identified real business pain that you can solve. Either ask permission to invite them to the next step or, if not a good fit, recommend an alternative or agree to the follow-up for when they are ready to move forward.

Decision

Well done you made the shortlist now as permission to

Demo your Product.

A demo is the most straightforward way to show your prospect what is on offer. You should have established through discovery your prospect's most pressing needs and gaps. Tailor a demonstration that ties together your product features into a story of exactly how your customer will use the product and how it will solve their specific need.

Provide Social Proof, Customer Reference Calls, Case Studies and Third-party Reviews.

Your buyer might not be 100% sold. So set them up with your satisfied customers who had similar business pain points and chose you over the competitors. Sometimes the most powerful sale is not made by a sales rep at all.

While you are moving the customer along the decision, continue to build a breath of trust-based relationships.

4. Establish a Trust-based Relationship by Delivering on Your Promises.

Demonstrate you have their best interest at your heart and prove you are trustworthy by always being honest and transparent in your interactions.

Your word is your bond.

If you commit, even a small one, you need to keep it. The minute a buyer questions your commitment, you risk them disengaging and looking elsewhere for a solution.

Build a strong business case always.

No matter what you are selling and how good your relationship is with a buyer, you need to make a strong business case for why your solution is better than the competition, meets the stated needs and quantify the ROI. Show buyers how your solution helps them and provides them with an excellent qualitative and quantitative return on their investment.

Connect on a personal level.

Connecting with your buyers personally is often overlooked in terms of the vital role it plays in securing new business. When you connect on a personal level and demonstrate that you do not have tunnel vision about closing the deal, you can build trust.

Have the buyer's best interests in mind always.

Always offer solutions that have the buyer's best interest in mind, even if it means offering an alternative or deviating from your plan. This will not only help you gain the buyer's trust, but you will also develop a strong reputation among your customer base and industry.

Solve do not sell.

Solve the right problem, not necessarily the first problem presented. To uncover the problem and the consequences, you must have a 3D or 360 perspectives of any given situation.



5. Elevate your Relationships into a Partnership, both Internal and External.

A trusted advisor status you must demonstrate you can give valuable advice outside your specialism. To do this, you need a network of other specialists you trust as your trusted resource.

Experience Sells.

Make buyers and customers feel happy after every conversation.

Never underestimate the influence of service quality. 89% of the clients refuse to cooperate further if they receive a poor-quality service, regardless of how the product or technology advanced is.

Value your client's feedback.

Buyers want a customised approach and buying experience, but their time is limited, making it relevant and impactful. Show the time to value and measure value in quantitative and qualitative terms and calculate what returns when.

Building long term relationships.

You can afford to slow down and go at your customer pace. Continue engagement past the sale, continue solving problems and co-creating, continue to deepen and secure broader relationships with monthly added value check-ins.



As the relationship experience develops, remember that your buyers and customers are thinking through these five levels of customer belief. Your role is to move them from disbelief and doubtful to belief and trusting.

Five Levels of Customer Belief:

1. Rapport Building - do they have integrity? Are they reliable?
2. Competency Assessment – will they make good on promises?
3. Recognition of Relationship - they see me rather than number/quota because they actively listen and respond to what I say.
4. Accept Proactive Advice – I feel they are demonstrably working in my best interest.
5. Trusted Advisor - I trust them to warn me of the gaps and risks and influencing my decisions.



What is the Most Challenging part of Sales?

To engage with and understand multiple decision-makers in a customer company of many stakeholders and influencers, some known and others unknown to you.

The Scale Your Sales Framework connects leading-edge capabilities to secure, retain, and grow key client relationships for long-term value and partnership. A key part of this is analysis the gap in perceptions of relationship strength and therefore the trusted status.

Measure the Value of Your Customer Relationships.

The typical buying group for a complex B2B solution involves six to 10 decision makers, says Gartner research. The decision-making unit may comprise six archetypes:

initiator, influencer, decider, buyer, user, and coordinator.

While many companies get fixated on senior decision-makers, there are many untapped opportunities among other more accessible stakeholders at the lower levels. Added to this is the COVID committee that is risk-averse and may not have an overview on all deals but can veto. So, the breadth and depth of the relationship directly impact the sustainability of your sales revenue.

Example

Think of one of your larger customer organisations that you think can grow and that you would like to gain more sales. Do you understand their organisational plan, business objectives and how your solution fits their needs? Do you value your key relationships, understand their drivers in the customer company and the specifics of the ROI outcome and added value relevant to each of these stakeholders and decision-makers?



What's the Biggest Mistake Salespeople make when trying to Position themselves as Trusted Advisors?

They thought they had a trusted relationship and then was surprised by a new incumbent they did not know about closing their rock-solid deal. Having never tested the relationship value and strength, arrogance, and assumptions set in.

I take my client through the Scale Your Sales assessment tool that helps them value the relationship's strength and the likelihood that the deal will close.

What Key Skills do Sales Reps need to be Successful today?

A Positive and Growth Mindset and Collaboration

No longer is sales one way; unless you have a co-creation mindset, the buyer will disengage. Sales is a collaboration between the seller and the buyers. No one salesperson knows everything, so invest in your network (net-worth) and create a circle of your own trusted Advisor and collaborators both inside and external to your sales organisation. This is part of becoming a trusted advisor.

As an Actionable Takeaway, what should Salespeople do as a First Step to get started on becoming a Trusted Advisor?

Reputation matters. The stakes are higher than ever now the post-pandemic dynamics have transformed the buying process. Buyers do not need to rely on word-of-mouth to learn about sellers and sales professionals they consider working with – they can easily research for themselves. When you examine your social footprint, what comes up? Does it represent your whole personality and expertise? When you search you as your buyer and customer would, what impression does it give them? Are you a faceless vendor, a trusted advisor, or a Thought-leader?

If you are not where you want and need to be, you can start by downloading my eBook Master the Art of Social Selling or book a consultation call www.scaleyoursales.co.uk.

Resources

When the [Huthwaite Group](https://www.huthwaiteinternational.com/) studied client's perceptions of professional service salespeople, they found that all of the critical elements of trust featured highest (in the client's words: candour, competence, and concern). <https://www.huthwaiteinternational.com/>.

[Edelman Trust Index](https://www.edelman.com/sites/g/files/aatuss191/files/2021-01/2021-edelman-trust-barometer.pdf) states that trust is at an all-time low. Customers who have a transactional relationship with the sales representatives give the company 14% of their available business on average, but the percentage jumped to 47% <https://www.edelman.com/sites/g/files/aatuss191/files/2021-01/2021-edelman-trust-barometer.pdf>

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Maya Angelou https://en.wikipedia.org/wiki/Maya_Angelou

Downloading Master the Art of Social Selling eBook <https://theproblem-solver.com/master-the-art-of-social-selling-ebook/>

About the Author



Janice B Gordon, The Customer Growth Expert, uses her 20+ years of business, sales, CX and leadership experience to unleash hidden potential and accelerate growth by investing in customer relationships. Recommended by LinkedIn Sales as 15 Innovating Sales Influencers to Follow in 2021.

Janice B Gordon is listed as the Top 50 Global Thought Leaders and Influencers on Customer Experience (Nov 2020) and 150 Women B2B Thought Leaders You Should Follow in 2021. She achieved listing as #4 Top Sales Guru in 2020 and is awarded #25 on Sage Top 100 Global Business Influencer 2017.

Janice is a Consultant, Speaker, Trainer and Facilitator, and author of *Business Evolution: Creating Growth in a Rapidly Changing World*.

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