

From Consultant to Courtier

TRUST IS THE PATHWAY

MATTHEW MAY

The aim of the perfect courtier is so to win for himself the favor and mind of the prince whom he serves that he may be able to tell him, and always will tell him, the truth about everything he needs to know, without fear or risk of displeasing him; and that when he sees the mind of his prince inclined to a wrong action, he may dare to oppose him and in a gentle manner avail himself of the favor acquired by his good accomplishments, so as to dissuade him of every evil intent and bring him to the path of virtue.

—BALDESAR CASTIGLIONE
(*The Book of the Courtier*, 1516)

In the world of professional advisory services, very few consultants make it to the level once known as Court Courtier—a close and trusted attaché to an influential prince, fulfilling the role of confidant and guide in all matters important. While part of the explanation lies in the prevailing business model of modern consulting (*read*: many clients and specialized, arms-length service), most senior executives would testify that such a consigliere is a rare but desired entity.

We know little of these modern-day courtiers, for the simple fact is that they prefer to serve few masters, and to do so in a mostly unsung fashion. (George Stephanopoulos and Ram Charan are two standout exceptions to the rule.) What we do know, however, is compelling and attractive: They are implicitly trusted, extremely influential, and highly compensated. In fulfilling the role of follower of the highest order, they are in fact leaders in their own right.

If we could spend time with a successful courtier, we'd want answers to questions like:

What is the nature of their relationship with their client? How is it achieved? What are the implications for those of us seeking that inner sanctum?

Having been taught by one, been one, and taught others on the path to becoming one, I can offer some insight into the philosophical underpinnings of the mind of the courtier.

Beyond Professionalism

Courtiers hold sacred a view of service quite above the conventional professional view that focuses primarily on a tangible business exchange—that is, fee for service. To the courtier, professionalism is simply the price of entry; it is the *intangible* transfer that defines the nature of their service. The intangible is *trust*.

To move toward courtiership, we must understand that our greatest personal capital lies in the aggregate value of our most important relationships—connective interpersonal assets for which the truest measure is trust.

■
*Open new
doors by
cultivating
the traits
that build
trust.*

Like any wealth-creating asset, trust requires continuous personal investment to grow in value, constant protection and preservation, and reasonable leverage to advance and accumulate more of it.

The difficulty is that we have a tendency to speak in platitudes on the issue, throwing the term on the table as something valuable and necessary without defining it or understanding how it works. Trust is a multifarious concern that mandates skill in its construction, for it doesn't happen by chance or circumstance.

Importance of Trust

While the consultant greatly underestimates the importance of trust by assuming it comes from simply providing excellent and reliable service, the courtier knows that mistrust to any degree will undermine his or her efforts, and that extraordinary personal action is required to build and maintain trustworthiness. Without a trustful relationship, the courtier is rendered ineffective and powerless—work cannot be performed, and commitments become meaningless. In fact, without trust, there is no need for a courtier, for seeking advice under such a circumstance would be foolish!

To be sure, industry has its share of organizational cultures characterized by a lack of trust. Most of us in the consulting profession have been exposed to environments in which people tend to retreat from one another, afraid of any perceived vulnerability. Apathy, suspicion, and fear rule the day. Actions are viewed as designed to hurt, and motives viewed as deceitful—even the most sincere and helpful behavior becomes circumspect. Cooperation occurs only under executive edict, with teams and business units laboring under a system of rigid policies and procedures mandating constant vigil. In such a distrustful setting, enormous energy is spent on compromise and enforcement, accompanied by a staggering loss in productivity.

Many of us, however, have been fortunate to work with individuals and organizations in which the level of trust is high, where information and knowledge is in open abundance,

where communication flows freely, honestly, accurately, and purposefully.

Trust is the oxygen of the intimate advisory relationship—without it, courtiership is a distant dream.

Defining Trust

It is difficult to find a good and guiding definition of trust, for the term seems to mean different things to different people, becoming a catchall phrase for anything remotely related to belief. In the context of this discussion, trust is something short of pure *faith*.

Faith is more of a blind belief and fanaticism that is largely beyond reason. Nothing can shake the conviction of the devoutly faithful—they easily rationalize factual inconsistency and evidence that dispels their belief. Trust, on the other hand, is something more delicate, more easily withdrawn—and thus more complex than simple *confidence*, which lies on the other extreme of faith and is based purely on logic, experience, or fact. Trust lies somewhere between faith and confidence, part belief, part reason.

For our purposes, then, we can safely define trust as *the belief that those upon whom we rely will realistically fulfill our positive expectations of them*.

Dynamics of Trust

We place trust in those we have come to believe will act in our best interest, and because trust is in part based on such a positive belief, we tend to trust those who see the best in us and in whom we in turn see the good—thus the exchange of trust becomes yet a self-fulfilling prophecy. As others place their trust in us, we behave in a manner consistent with becoming more worthy of that trust. As we place our trust in others, they become more trustworthy.

Of course, this is the ideal. What is important to realize is that the need for trust is borne only out of our vulnerability. We expose ourselves when we place our trust, thus we go on a heightened alert for behavior we deem trustworthy—signs that work to confirm our decision. If there is no risk of harm, trust is of no matter. Each of us determines on an individual

basis how much trust we wish to grant another at any given time. For example, we may offer only limited trust on a trial basis in forming new relationships. As the affiliation develops, the amount of exposure we are willing to accept grows to the extent our expectations continue to be met. Disappointment leads us to reduce our risk, to limit our susceptibility. But as it concerns human behavior and interaction, zero risk is not attainable. Since all of us depend and rely on others, we cannot avoid risk.

Enter the need for trust. Individuals are unique in their interests and abilities, and we can no more guarantee the actions of another than we can foretell the future with any degree of certainty. Trust, then, will always be a factor in our work and life—trust in self, trust in others. Trust and risk give rise to one another—they do not exist apart. Trust cannot grow unless we place ourselves in a position that puts our current level of trust at some peril. The difficult questions then become: How do we gauge the degree of trust within a relationship if we have not put it to the test? How do we determine whether we are right in trusting another unless we risk letdown? Likewise, how will others determine whether we can be trusted unless they risk placing their trust in us? *In short, how do we determine whether trust is warranted?*

There is no easy answer. We all have a variable level of trust more easily lowered than raised. It is simply in our nature. This level is not unlike our pain threshold. We each perceive discomfort differently, with varying degrees of tolerance for different kinds of distress and pain becoming apparent when our discomfort reaches a point of zero tolerance. It is at this point that a threshold is established, and we take care to avoid it in the future. Trust, in concept, works much the same way. We each have a limit of trust that we are willing to risk, and once breached, we withdraw that trust, sometimes permanently. The challenge becomes learning to manage our threshold, developing the level of trust others have in us, and in so doing realize the determinants of trust that enable us to place our trust in others.

Imagine, for example, a continuum with mistrust on one extreme and high trust on the other. The degree to which we trust someone floats in dynamic fashion along the scale, varying from situation to situation, relationship to relationship. The trust you place in a close advisor differs from the trust you place in your physician, your acquaintances, or your family—because the nature of reliance and dependence in each relationship varies.

This variance adds difficulty and complexity to the would-be courtier's challenge.

Building Trust

One thing seems certain: We can neither design trust nor demand it from others any more than we can declare ourselves trustworthy. In fact, we may encounter skepticism and suspicion if we so much as attempt to do so. It remains to arrive at a strategy that provides the elegant solution.

The approach is twofold: First, give compelling reasons for others to trust us. Second, give no reasons for mistrust. To become a trusted advisor, we must model trustworthiness while simultaneously extending our own trust. At the same time, we must extinguish immediately any chance mistrust is given to prosper.

And herein lies the dilemma. It is precisely at this point that the weary platitudes amounting to little more than “play nice” get bandied about. We hear about diplomacy, civility, grace, and respect. *To be trusted, we need neither to be liked nor agreed with.* We hear about honesty and integrity, which are all too easily voiced, all too eagerly demanded, all too rarely practiced. Even the words seem to have lost their meaning amidst the alarming fall from grace of once highly respected business leaders. Needed are more practical toeholds that give us latitude to act, understanding that no two relationships or situations are identical.

The Three C's

Trust requires the careful and purposeful weighing and balancing of three elements: consistency, competence, and caring. Trust

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requires *consistency*—honoring commitments, facing reality, and revealing motives—because you can't trust someone you can't count on. Trust requires *competence*—demonstrating confidence, avoiding overpromising, and accurately assessing ourselves—because you can't trust someone who can't get the job done. Trust requires *caring*—exhibiting sincere concern for others—because you can't trust someone you believe doesn't care. Let's take a closer look at all three.

Consistency

In its purest form, consistency is the clear and manifest alignment of thought, word, and deed. If one thinks one thing, says another, and acts to belie one or both, there can be no trust. It is the repetitive demonstration of keeping our sincere word—over time and across a myriad of situations—that results in gaining and sustaining trust.

Consistency is a matter of consciously avoiding contradictory and, in the extreme, hypocritical behavior—conduct that can give the impression that one's selfish interest is the primary concern.

Inconsistency erodes trust, because it's not predictable, dependable, or reliable. Inconsistency creates doubt in our mind about someone's real motives, tells us they are either not truthful or not willing and able to meet their obligation to us—clear signals not to trust.

For example, we become suspect of someone who doesn't appropriately divulge the full extent of their knowledge of things that may have direct impact on or be of high importance to us. Such selective information sharing—whether outright lie, subtle manipulation, or obvious omission—is a form of deliberate deception and clear inconsistency of word and deed. Further, we can't trust someone who discloses the same message differently to different audiences in different settings, especially if the information is in any way contradictory. And, while one's beliefs and principles may understandably evolve over time, any unexpected and unexplained erratic behavior, frequent sudden departures, or abrupt dramatic shifts in position will serve to destroy credibility.

Now, when inconsistency exists, we may seek to understand the cause. Remember, trust

depends upon the situation and relationship. For example, a true confidant's simple mistake easily explained and prevented in the future may not warrant mistrust, for it is likely to be an anomaly. However, in a newly formed affiliation, such early inconsistency is reasonable grounds for doubt.

Three practices can help build the element of consistency:

- *Honoring commitments.* Holding oneself responsible and accountable for following through on promises made—using everything in our power to deliver on the expectation to the extent it is within our control.
- *Facing reality.* Openly confronting difficult issues head-on with constant massive direct communication informing others of where we—and they—truly stand on a given issue.
- *Revealing motive.* Abandoning political posturing in favor of transparent, open agendas that support the values and best interests of all connected to the situation.

Competence

Competence is the primary path to achieving the positive outcomes and results expected of us. If we don't have the capability to accomplish what is expected, there can be no trust. It is a matter of making a commitment based on a realistic assessment and communication of our ability in relation to our client's requirement. Incompetence—simply defined as long on promise and short on delivery—erodes trust, because it undermines credibility. Competence is the most concrete aspect of trust, and perhaps the most unforgiving. Character aside, we trust only those we believe to possess the capacity—meaning experience, effectiveness, and expertise—to produce the desired outcome or stated intent. Consequences cannot be argued or denied—no results, no trust!

Three practices can help build the element of competence:

- *Demonstrating confidence,* because confidence in our own power to perform instills confidence in others. This might easily take the form of sharing appropriate information

on our successes and failures, providing an accurate picture of our ability to meet the demands of the relationship and situation.

■ *Avoiding overstatement*, which means being forthright in communicating our known limits, given the challenge at hand, to enable the other person to gauge the amount of risk they might be willing to accept—when we are knowingly out of our depth, we must be willing to speak up and communicate that fact.

■ *Accurate self-assessment*, which in turn demands constant feedback. Finding out how others see us is especially vital to our efforts to render trustful relationships. When we learn to encourage and receive honest feedback on our performance, deeper learning is enabled, allowing us to make timely corrections and improve our work—higher competency realized, higher trust enabled!

When we are untested and unknown, establishing our credibility will most likely begin in this very arena.

Caring

Caring is perhaps the softer side to trust, yet perhaps the most difficult. It is certainly the most immediate gauge of one's trustworthiness. Consistency and competency require the test of time, but the behaviors demonstrated in a single interaction can herald future expectations, and thus set initial levels of trust.

The practical aspects of caring amount to nothing more complex than exhibiting the kinds of behaviors that signal we care; for example: confidentiality, empathy, humility, sincerity, cooperation, objectivity, collaboration, self-disclosure, listening—the list goes on.

The Dilemma

If consistency, competence, and caring are all required for building trust and for regaining trust when we have lost it, how do we reconcile them when they are in conflict? It has been my experience that the facets of trust can and often do find themselves at odds with each other, because certain situations (or relationships) demand one element over the other—

dilemmas that by definition hold the potential to erode trust.

This is the ultimate litmus test for all aspiring courtiers: how to advise our client on managing the tension among the three elements when we see trust in peril. For example, overemphasis on outcomes may signal a lack of concern with people, so what do we do when we see that the need to achieve results and thus act competently may conflict with the need to demonstrate caring? A CEO who must reorganize or rethink an entire business model in order to keep the company viable in terms of business results may face the very real possibility of workforce downsizing, an act that no matter how well managed or communicated destroys the caring component of trust. “He cares more about money than people” is the common lament.

The competitive nature of today's business environment mandates quick shifts in direction and strategy, so what do we do when our client has made clear commitments that must (sometimes frequently) be broken—thus damaging credibility and consistency—to ensure organizational survival? The need to competently manage an organization in the information age often requires the kind of corporate agility that gives the impression to employees that the leader is failing to follow through on promises. The sword is double-edged: Communicating every shift in an effort to keep everyone well-informed seems to imply indecisiveness, and not communicating at all in an effort to avoid setting short-lived expectations seems to imply dishonesty. “Program of the month” is the common lament.

One way to advise on these kinds of trust issues is to ensure that two of the three C's are especially strong. This has its limitations. For example, while a leader can sometimes overcome a perception of inconsistency by demonstrating real caring and delivering competent performance, over time the issue of consis-

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tency will become more and more imperative. Likewise, poor performance may be overlooked once or twice if the leader clearly keeps his or her word on all matters and shows concern for the welfare of others. Still, these are exceptions to the rule and generally short-lived workarounds.

The better strategy is to advise in a manner consistent with the stated core purpose of the organization. If all actions, decisions, and communications are in full support of the purpose of the organization, all three elements of

trust will align optimally. The challenge here is that only the very best companies have such a clear understanding of a compelling purpose, one that states a nobler sense of contribution to a higher common good. But then, that's a question for another day.

On a parting note, know that we underestimate by a huge margin the importance of trust in our relationships. And it is high trust that is the hallmark of the courtier. ■

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