



**Actuaries
Institute**

YAP – Relationship Building with Internal and External Clients

Presented by Jennifer Lang



The Trusted Advisor

Relationship Building with Internal and External Clients

Young Actuaries
Program

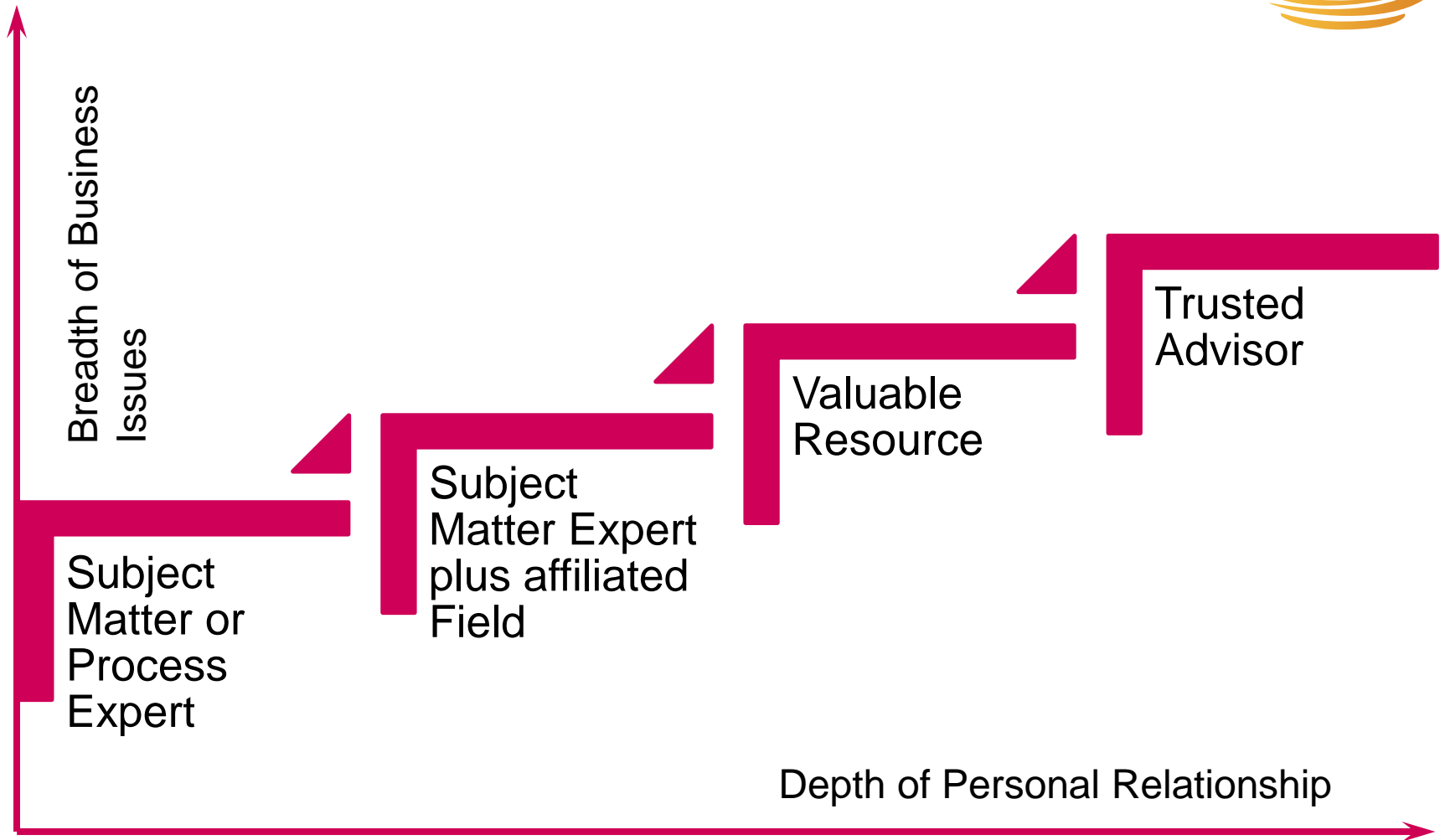
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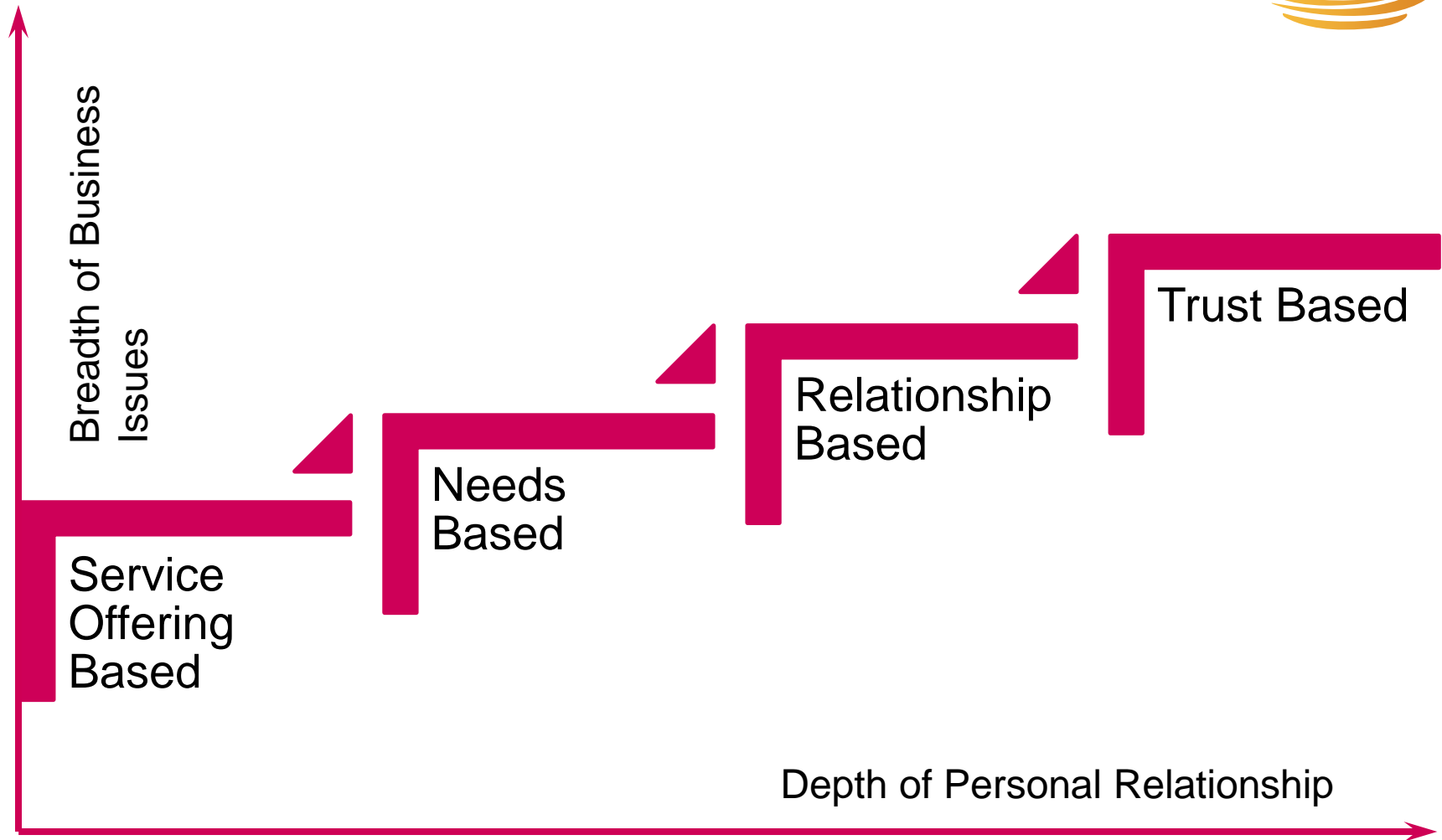


Trusted Advisor Model



The Trusted Advisor, by Maister, Green & Galford

Trusted Advisor Model

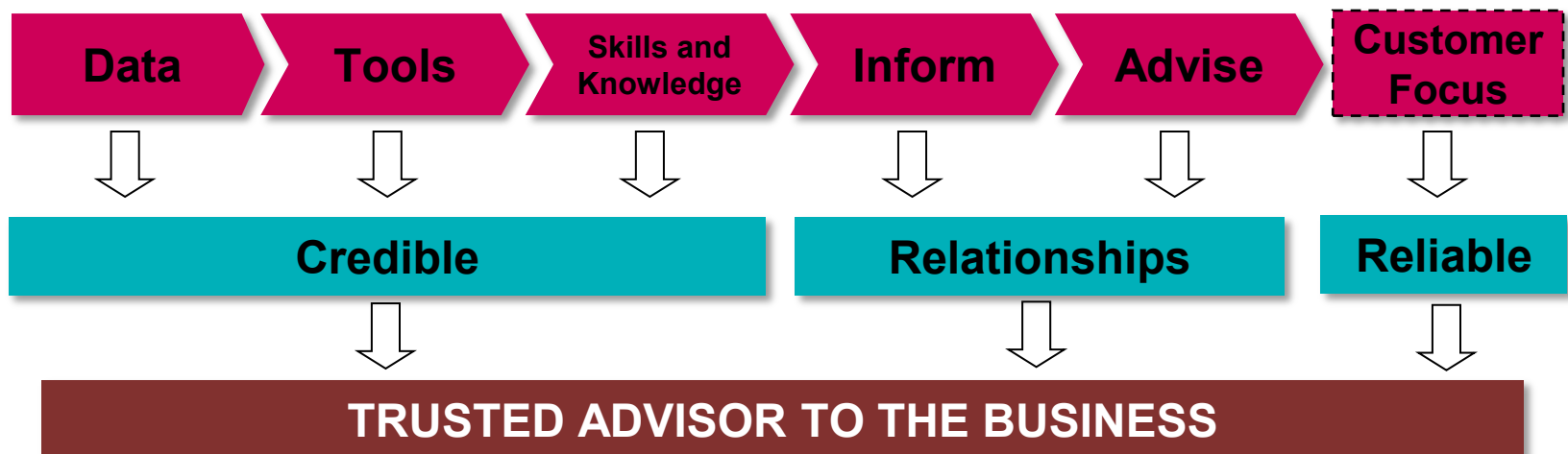


The Trusted Advisor, by Maister,
Green & Galford

How do we become Trusted Advisors?



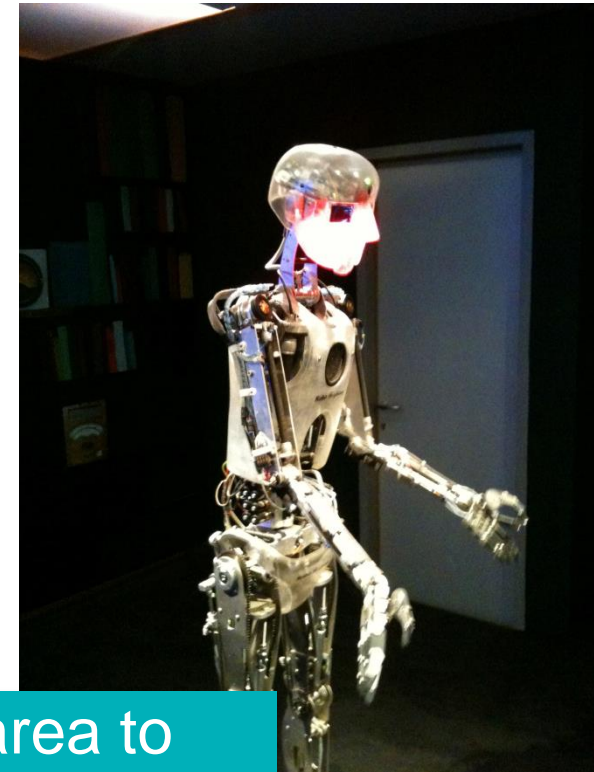
This model was developed from David Maister's book by my colleague Darren Robinson



We've got the tools to be credible. How do we become a trusted advisor?



- **Earning Trust**
- **Giving Advice effectively**
- **Building relationships**



Each of these areas is a key area to becoming a trusted advisor

Earning Trust



- **Trust Grows, rather than just appears**
- **Is both rational and emotional**
- **Presumes a two-way relationship**
- **Is intrinsically about perceived risk**
- **Is different for the advisee than it is for the advisor**
- **Is personal**



Giving Advice Effectively



- **Understand the recipient's perspective**
- **A chat with Mum or Dad – advice, not condescension or lecturing**
- **Finding the right words – explain not lecture**
- **A teacher's skills**
- **Understanding the hidden motivations**
- **Customise to the person**

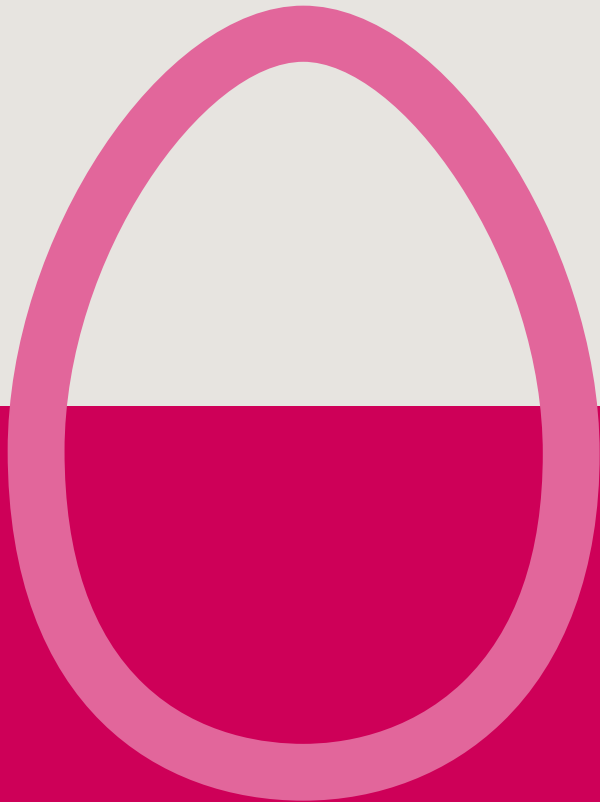


Building Relationships



- **Go First**
- **Illustrate, don't tell**
- **Listen for what's different, not for what's familiar**
- **Be sure your advice is being sought**
- **Earn the right to offer advice**
- **Keep asking (and listening!)**
- **Say what you mean**
- **When you need help, ask for it**
- **Show an interest in the person**
- **Show Appreciation**





Thank you

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The contents of this presentation are entirely my own views, and do not reflect those of my employer, past or present.

I have used substantial content from the book *The Trusted Advisor*, by Maister, Green and Galford.

