

# The Trusted Advisor

By Angus Strachan, PhD

Throughout history, powerful people have needed confidantes, people they could trust, whose judgment they could rely on. It is an ancient role: Louis XIII was advised by Cardinal Richelieu; the Earl of Essex was Elizabeth I's trusted ear; Franklin Roosevelt relied on his wife Eleanor's intellect and common sense; Ronald Reagan had his "Kitchen Cabinet" of billionaire captains of industry; and even Elvis had the Colonel!

Leaders in organizations also need a confidante, someone who can listen, who can be trusted, who is objective, and who can offer useful advice or personal service. I call this person a *trusted advisor*. In my career as an organizational psychologist, I have found myself increasingly in this role. Having an objective outsider in this role, someone who has no vested interest, is very important. Ask Macbeth about his Lady, or the Czarina about Rasputin.

The role is more than being an executive coach, where the focus is on assessment, feedback and the development of management and leadership skills. It is more than being an individual psychotherapist. The role has usually developed where I have had a relationship with an individual or group over years, and have assisted in multiple roles. For example, with one client I did workplace dispute resolution with factions in his group, and later assisted with developing a supply-chain organization. With another client, I developed a relationship with a board of trustees of a non-profit organization, after managing their personnel selection for many years. Both of these clients now call on me to perform a variety of functions.

In the role of trusted advisor, I have found myself playing various roles. As I have developed this article, I have found that these roles fall into two major groups: **relationship development roles** and **action-oriented helping roles**. The latter depend on the former.

## Relationship-development roles

**The Listener:** I provide opportunities for a leader to talk about the things they don't or can't normally talk about with their direct reports, supervisors or peers: the thoughts and feelings that can fall between the cracks. I act as more than an active listener, becoming what I call a "power listener" who goes beyond the surface and pushes for the discussion of deeper meanings and aspirations. Through experience, the leader realizes that he or she can confide in me without his or her message being transmitted to others.

**The Encourager:** Many leaders can begin to be discouraged and lose hope, particularly when they are pursuing long-term goals that require effort and focus over an extended period of time, or when they bump up against obstacles to progress. A trusted advisor can provide perspective and encouragement when a leader feels dispirited or down. This is especially important with leaders who feel they must always display a stiff upper lip, showing no "weakness" or hesitation in the leading of their troops.

**The Confronter:** Many leaders are surrounded by people who are wary of expressing their true opinions, particularly about the leader's behavior. It is hard for them to say "no". One of the attributes I value is my integrity. I give objective feedback to leaders. I confront them on how they behave with their direct reports or if I think they may be about to make a foolhardy political move. For example, I counseled a division general manager not to take on a new role which would require a very entrepreneurial approach, because his style was more that of a strategic thinker and decision-maker. His heart was set on it but no one else would tell him he was not suitable. Eventually, he decided to have someone else take on the role.

The above three roles may be recognized as offering the conditions for a therapeutic relationship championed by Carl Rogers: warmth, empathy and genuineness. Now here are the more action-oriented helping roles.

## Action-oriented helping roles

**The Advisor:** Often, after I have worked with a leader and his or her team, and as the leader develops trust in my abilities, he will request my advice. Frequently, this has been as the leader is re-organizing or is thinking about succession planning and wants input and advice on who to appoint where. I can help him think about who will complement, rather than mirror, his own team role (Belbin, 1981). For example, bright, creative leaders often make the mistake of selecting people like themselves for their teams, when someone who has different characteristics, such as an implementer or thoughtful foil, would make the team more effective overall.

**The Strategizer:** Leaders frequently wrestle with political issues in their organizations. How can they deal with the Board of Directors? How can they negotiate with a union? How can they enlist the help of a powerful manager (or go around them)? In the context of my personal relationship and with the knowledge of people in the organization, I can help strategize.

**The Facilitator:** This, of course, is a very natural role for a psychologist. As a follow-up to giving advice and laying out a plan for purposeful change management, I may be requested to carry out the implementation by facilitating some or all of the subgroups or cross-functional teams involved in the change process.

**The Writer:** Finally, a role I have found myself playing increasingly is that of a writer. I enjoy writing. Recently, I have been asked by some who trust me to write for them. I have drafted letters, speeches, presentations, and policies based on my discussions with busy leaders.

How can you become a trusted advisor? In my experience, being a trusted advisor is not a role you can plan to develop. However, it is something that a psychologist is well trained for. Psychologists have the ability to show warmth, empathy and genuineness. Further, I have found that developing this role is fostered by a helpful attitude, availability and responsiveness. Convey a desire to be helpful across the board. Be available using all channels of communication-in person, by phone, by email and by fax. Respond promptly. Being able to turn things around quickly is a major asset that busy leaders appreciate. Here, you have an advantage over staff who usually have a gazillion matters to attend to. Also, I have learned to overcome the secondary socialization that I received in graduate school to get everything right. I have learned that a 'good enough' piece of writing the next day is far superior to a 'perfect' piece six weeks later.

Finally, as Jag Sheth (2000) so eloquently predicts, the world of organizational consulting will become increasingly bifurcated into two types of services: low-cost, brief consumer-type services which will increasingly be delivered over the Internet; and higher cost, longer term, more personal services which will be delivered face-to-face. The latter is the role of the Trusted Advisor.

### **References**

Belbin, M. (1981). *Management Teams*. London: Heinemann.

Sheth, J. & Sobel, A. (2000). *Clients for Life: How Great Professionals Develop Breakthrough Relationships*. New York: Simon & Schuster.

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