

Trusted Advisor Program

prepared by MOBIUS EXECUTIVE LEADERSHIP



MOBIUS
EXECUTIVE LEADERSHIP

Trusted Advisor Program Overview

The program is anchored in two classroom components, each lasting four days. Each session orients around building “practical coaching/advisory skills”— the ability to discern astutely what is needed in conversations with clients and to act skillfully to execute it to drive depth and insight.

In addition to ongoing case based application throughout the program, each intensive has its own focus and the two together gradually help participants build mastery and skills at client relationships.

Intensive One focuses on two areas: developing the right mindset to approach trusted advisory conversations with clients; and understanding the foundation of your own skills and limitations as an advisor counselor. In this session participants will video-tape a pre-program baseline of a conversation with a client to use as a snap shot of their current intervention repertoire. Participants will also learn to contract mindsets traditionally associated with “consultant as technical expert” with the mindset of “consultant as trusted advisor” whose work is to understand the range of interrelated challenges faced by the client both strategically (their business and industry) and as a leader. Participants will leave with a new framework in their minds to analyze and appreciate their role with clients. Consultants learn the importance of balancing their attention between delivering substantive results and managing their relationships with the clients. They will be given concrete skills to help them build client trust and engender client confidence in their counseling expertise. Participants will leave with a new framework to analyze and appreciate their role with clients. They will also begin to understand their own styles and patterns when working with clients and plan their own map for development over the course of the program. Intensive One also launches the peer coaching circles, Mini-Boards, that will meet monthly for the duration of the program and for the six months following the program's completion.

Intensive One focuses on the core behavioral skills you need for successful counseling conversations. Building on the mindset established in Intensive One, this session teaches the core interpersonal skills needed to build trust and counsel clients. We will distinguish between different kinds of conversations, such as the distinction between “conversations for action” and “conversations for building rapport and relationship.” We will practice handling a range of conversations with clients, including challenges like “moment of truth” conversations in ways that build rather than undermine trust. We will likewise practice how to shift from the substantive ground of what needs to be done to the deeper territory of discussing client's fears and aspirations.

Intensive Two focuses on the qualities required to counsel clients effectively and equips consultants to handle the most challenging client conversations. This session supports participants to engage clients openly, candidly and with compelling personal presence. It explores the myriad dimensions of relationship management and leadership presence and gravitas. This final forum has a focus on helping participants to exhibit the skills they have learned in the program consistently and authentically in the most high-pressure situations. Participants will learn how to expand their emotional intelligence and how to effectively work with clients in distress. They will practice providing clients with interpersonal support as well as coaching. Very practically we will teach a coaching model that allows consultants to open up a coaching topic, explore it broadly and in a facilitative manner with a client, and close the conversation with alignment on key next steps and actions. We will also help participants understand the multiple dimensions of trust and how to foster and repair trust with key clients. This will enable participants to blend relationship building skills with new expertise at collaborating with clients to generate business solutions and positive results.

Another element of this Intensive involves pushing back effectively on clients and helping surface blind spots or question key assumptions in their business reasoning. This intensive also moves into the more delicate domain of personal character

and maturity, involving an internal shift from self-importance to confidence with humility and less self-orientation. In our view, this component is essential to achieving success with clients since many frameworks and tools that work well conceptually do not work in practice because they are executed without authenticity. This last intensive will also address “pulling it all together” from the field and forum program as well as how to continue learning and development going forward.

Supporting the Learning: Practices in Between Sessions

We propose to use a range of methods to support participant’s development in between Intensive Sessions.

Peer Coaching: Each participant will have a peer coach with whom they check in weekly and a Mini-Board with whom they communicate monthly about their application back on the job. These groups are important because they can continue long after the field and forum program is over.

Video Content: Each participant will receive additional support via asynchronous video downloads covering topics related to themes of the program such as leadership presence, influence without authority, emotional and social intelligence, authenticity and trust etc. These videos, produced by Mobius and our media partner, More Than Sound, include interviews with thought leaders in the field of leadership development such as Warren Bennis, Peter Senge, Richard Boyatzis, Bill George, Theresa Ambile, and Erica Ariel Fox conducted by Daniel Goleman, author of *Emotional Intelligence*.

Reading: Participants will get reading assignments between the sessions to supplement the learning in each Intensive. Some readings will be offered to all participants and other reading will be assigned to individual participants based on their own development path. We have many ideas about helpful and effective readings on related topics to the program and at the same time we suspect that creating the reading list together with you will produce the best possible set of complimentary materials for the participants.

Development Plan: In advance of Intensive One each participant will work with their sponsors to identify one to two key skills they wish to foster during the program. At the end of each in person session they will identify a few specific behaviors they wish to practice and cultivate, related to their development goals for the program, in that field period. The development plan should focus equally on amplifying their strengths as it does in expanding their client repertoire.

Executive Coaching: Optionally, each participant can also have an individual coach from Mobius who will check in with him or her once a month for the duration of the program. In past offerings of this program this element has often been rated the highest value because it supports individual embedding of the mindsets and skills the program seeks to foster. These coaching calls will support participants to design action experiments and to apply the lessons of the previous intensive to the client situations they face during the field period.

Conceptual Background for the Trusted Advisor Program:

Putting People Into Performance

This program as currently conceived is designed to be comprehensive and transformational for participants as an immersion in coaching mindsets, skills, and stance as they apply in client contexts. In light of the range of competencies needed to master the consultant-counselor role, this highly applied training provides broad introduction to numerous fields, including: coaching; neuro-linguistics; action science; communication and influence skills; masterful conversations and leadership presence. The program also covers material on emotional intelligence and building trusting, confidential relationships with clients. Over the course of the six to nine months the program provides a live and ongoing context in which participants receive real-time feedback and input on their impact on others.

Conceptual Backdrops to Our Program

Throughout the duration of a program like this, we draw from a wide range of intellectual and practical frameworks. In the section below, we highlight a few components as examples of the conceptual and methodological lineages with which we work.

The program focuses on changing mindsets, challenging mental models, and building higher degrees of self-awareness. The ability to spot and challenge mental models in oneself and for clients is a critical competence in creating paradigm shifting conversations. We want to increase participants' understanding of the degree to which our subjectivity and filters of interpretation fundamentally shape our assessments and judgments in situations. In one module we present "The Ladder of Inference," developed by our colleagues Chris Argyris and the late Donald Schön at MIT as a tool for understanding the cognitive maps we use to make sense of the world and the perceptual patterns we use for making inferences, recognizing patterns and directing our awareness and attention.

In this program we also want to raise participants' self-awareness. To do this we use methodology drawn from the toolboxes of Action Science and the Harvard Negotiation Project. This includes using dialogues from participants' client context as a springboard for increasing participants' recognition of their own patterns and styles. This session also includes an abridged version of the Harvard Law School's Interpersonal Skills Exercise as well as Action Science Two Column Case technology.

One outcome of the interpersonal skills experience is development of the critical aptitude for being "in the dance" of the conversation as well as what our colleague Bill Ury refers to as "going to the balcony." This session presents the model of becoming a "reflective practitioner" as an overarching stance for participants to hold and practice when engaging critical client conversations.

This program also introduces the distinction from Action Science between the public conversation (what they call the "right hand column," or what is said out loud) and the private conversation (what they call the "left hand column," or what people think and feel but do not say). Through this technology, participants come to understand how the interior monologue and mood in one's internal frame is shaping the action being taken. Heightening participants' awareness of their own patterns of thinking and reactivity through this format of case analysis enables greater flexibility in the heat of the moment with clients. With that understanding participants will learn to de-construct and process their internal dialogue. This critical ability creates a shift where damaging internal/external communication transforms into people-centered, clear, productive assessments that create more powerful communication and connection.

The program helps each participant to better understand the strengths they bring to client relationships and to create a personal development plan for their own learning objectives for the program.

The Trusted Advisor program, in its exploration of conversation, looks at key skills in coaching, influence and dialogue. The Intensive will teach a straight forward and practical Mobius Coaching Model to use in client conversations as well as related tools such as a structure for asking solution focused questions. As component skills at coaching conversations, including "moment of truth" conversations, this intensive explores skills for micro-observation and giving and getting feedback effectively. As described by Mobius Senior Consultant Dianne Argyris, micro-observation is the ability to observe key patterns in the small moments of interaction. The ability to observe these patterns closely and to describe them simply and cleanly (in other words, without judgment) is a central skill at learning to coach your clients. This critical coaching competence is taking "clean" observations into a coaching conversation to enable mindset and behavior change in your client. The consultant has to create alignment around offering their observations and then guiding a dialogue between

the consultant and the client about the meaning of the observations. This multi-dimensional conversation draws on skills for offering feedback, grounding assessments in micro-observations of behavior, and building and restoring trust. While feedback is talked about a lot, it is seldom well understood. In this part of the program, the feedback conversation would be broken down and experienced from the various angles of “requesting feedback,” “giving feedback,” and “receiving feedback.” The norms related to feedback vary widely from situation to situation and generally there is not a common understanding of these variables.

In teaching participants to conduct high stakes confrontational conversations, we draw extensively on the models in *Difficult Conversations*, published by our close colleagues Doug Stone, Sheila Heen and Bruce Patton and written in collaboration with numerous Mobius Senior Consultants. For example, one of the central underpinnings of having so-called “difficult conversations” effectively is the craft of balancing good questions (high quality inquiry) with sharing your reasoning and asserting your interests clearly (high quality advocacy).

To further equip participants to offer coaching to clients in real time about specific and problematic behavior that they observe, participants need to learn how to handle resistance from clients. In presenting this topic we draw extensively on the work of Chris Argyris who termed a set of resistance behaviors as “defensive routines.” Being competent to attend to “defensive routines” is critical in the pursuit of any coaching goal because these patterns of resistance act as blocks to learning and development.

Clients encounter many different faces of fear in their pursuit of a particular set of outcomes and it is essential that the coach be able to discern the type of resistance being encountered and then offer tools for navigating them. As examples: some resistance comes in the form of a person’s internal critical narrative; some resistance comes in the form of resignation or hopelessness; sometimes defiance is the face of the resistant force. Finally, there is a type of resistance that is pointing to a quiet wisdom to which the client is so unaccustomed to listening and following that they do not recognize it for what it is. We will use Argyris’ models to teach participants how to identify what forms of resistance are surfacing for clients and how to interact successfully with them to achieve their ultimate learning goals with clients. The element in these high stakes discussions with clients, especially around blind spots and unconscious habits, that seems to be most variable is the “degree of directness” that is appropriate or acceptable. In some situations, it is possible for two people to be very honest and open with each other when dealing with a very difficult topic. In other situations, this degree of directness is not evident, and is seen by some people as not possible. We will teach people a range of choices from direct “confrontation” when needed to gentle facilitation when appropriate.

In the Trusted Advisor Program will also focus on cultivating integration in the participants by fostering alignment between their underlying stance and the mindset and skills they have learned. In our view, leadership and coaching skill development must address leadership presence, the ability to connect, to produce trust, to be effective in the face of fear, anxiety, resentment, breakdowns, attack and other forms of reactivity. We draw on techniques from movement, martial arts, theatre and other expressive arts to help cultivate leadership presence and gravitas in client conversations.



MOBIUS
EXECUTIVE LEADERSHIP

Mobius North America

177 Worcester Street Ste. 202 | Wellesley Hills, MA 02481 | USA
T +1 781 237 1362

Mobius Europe

15a Saint Georges Mews | Primrose Hill, London NW1 8XE | UK
T + 44 20 7586 5414

URL: www.mobiusleadership.com
Email: Info@mobiusleadership.com