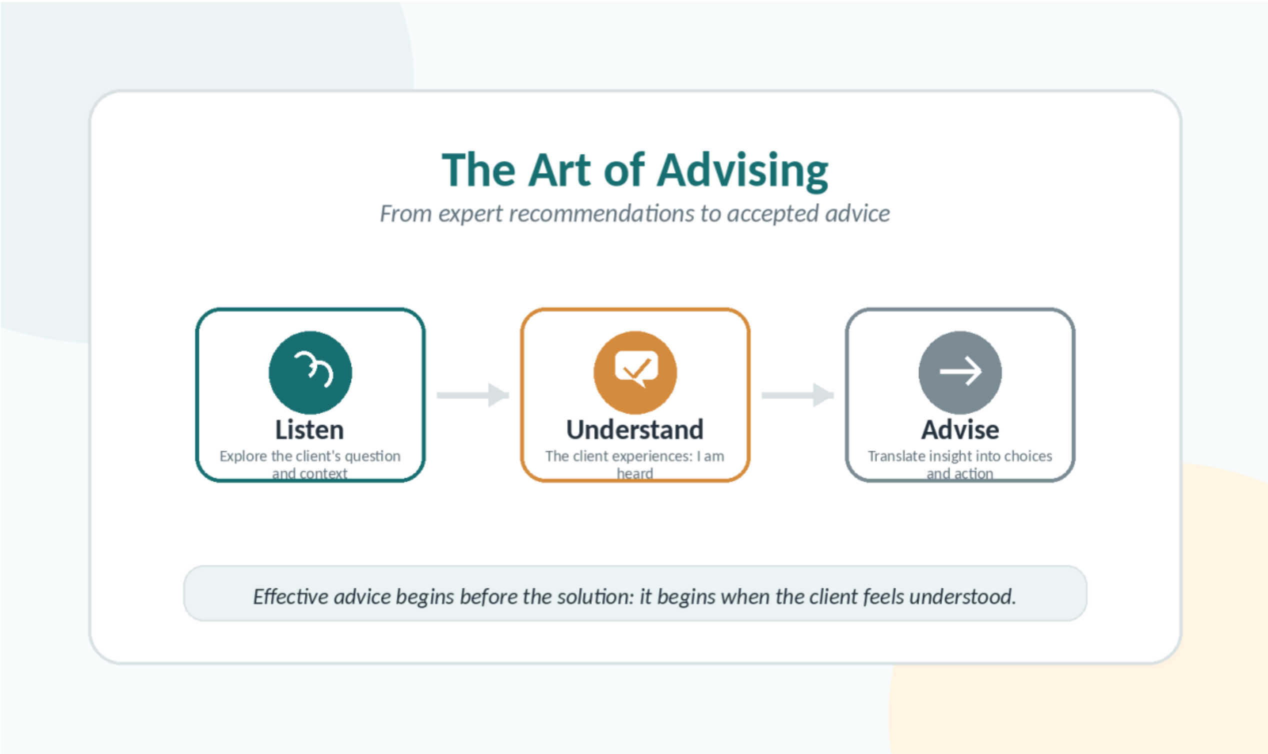
The Art of Advising

From expert recommendations to accepted advice



A professional advisory conversation starts with understanding, not with the solution.

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Reading guide This document combines advisory practice with a relational view of trust, acceptance and influence.

Executive summary

Many advisors assume that a sound recommendation will convince a client by itself. In practice, the client often cannot fully assess the technical quality of the advice. The client therefore looks for something else: whether the advisor has understood the question, the context, the stakes and the client's experience of the problem.

Effective advice is the product of two elements: the quality of the solution and the client's acceptance of that solution. Because these elements multiply each other, excellent expertise has limited effect when acceptance is low. Acceptance is not a final approval at the end of the meeting; it is built throughout the conversation.

The professional art of advising is therefore the ability to combine expertise with disciplined listening. The advisor first creates trust, explores the client's experience and helps the client feel heard. Once that moment of understanding has been reached, the client usually relaxes. The conversation changes from explaining and defending to exploring and considering. Only then does the advisor have full permission to redefine the question, challenge assumptions and propose a course of action.

Central principle First understand the client in the client's own logic. Only then translate expertise into advice that the client can accept and implement.

1. Why good advice does not automatically persuade

A client asks for advice because the answer is uncertain, difficult or risky. If the client already knew the solution, there would be no need for an advisor. This means that the client is often not in a position to judge the technical quality of the recommendation immediately.

A common advisor's mistake is to move too quickly from diagnosis to solution. The advisor may already understand the problem, but the decisive issue is different: does the client know that the advisor understands it? The client determines whether the question has been accepted and understood, not the advisor.

When the advisor takes time to surface the client's real question, interests, concerns and assumptions, trust increases. The client starts to experience the advisor as a professional who listens, thinks and works with care. That experience prepares the ground for acceptance of the eventual advice.

Professional implication The solution is not the beginning of influence. The beginning of influence is the client's experience of being taken seriously.

2. Effectiveness: quality multiplied by acceptance

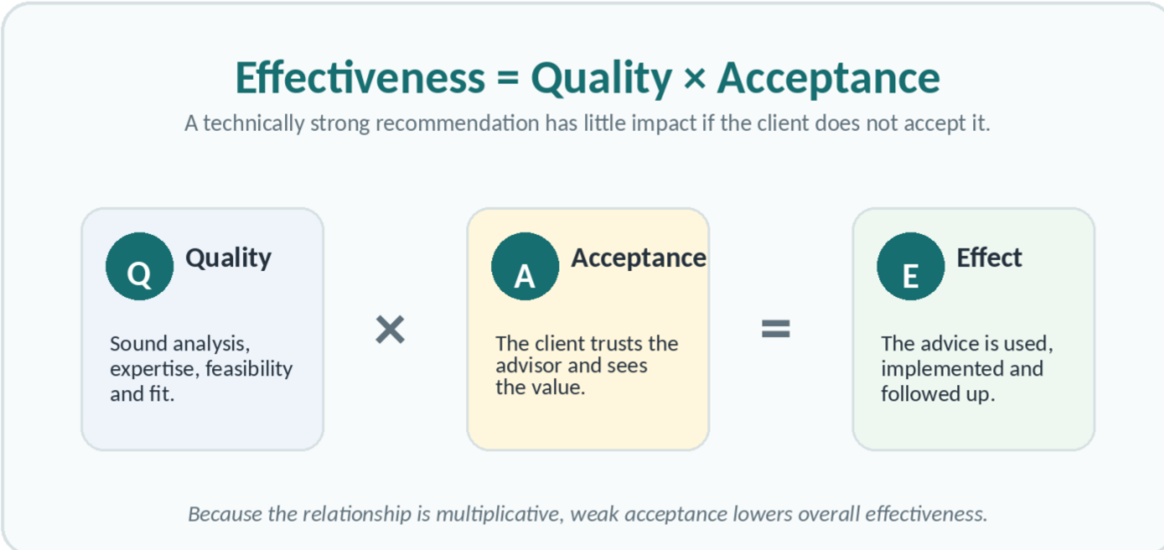

Figure 1. Advice becomes effective when quality and acceptance reinforce each other.

The effectiveness of advice can be expressed as: Effectiveness = Quality × Acceptance. Quality refers to the professional substance of the recommendation: analysis, expertise, feasibility, timing and fit. Acceptance refers to the client's willingness to trust, use and implement the advice.

Because this is a multiplication, a low score on one factor reduces the total effect. A technically excellent recommendation can still fail when the client does not believe it, does not feel heard or does not recognise the issue as their own. Conversely, high acceptance without sufficient quality can lead to action, but not to responsible professional advice.

This document assumes that the advisor's technical quality is sound. The main focus is therefore the factor that is often underestimated: how acceptance is built through the relationship, the conversation and the process.

3. Trust in the advisor

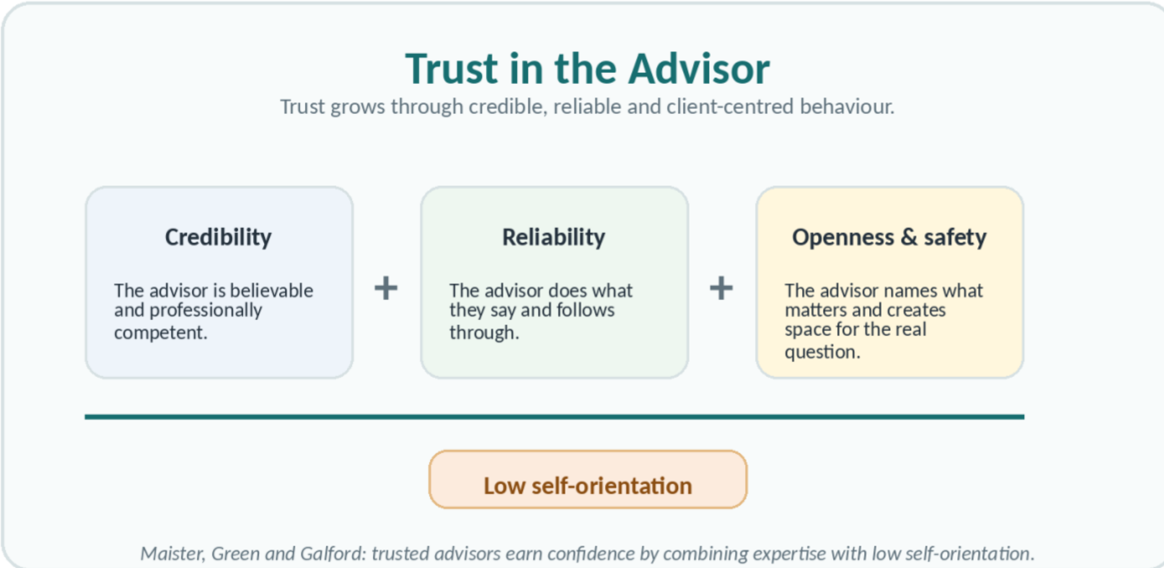

Figure 2. Trust increases when credible, reliable and open behaviour is stronger than self-orientation.

Acceptance begins with trust. Trust is not a vague atmosphere; it is produced by observable behaviour. Clients watch how the advisor listens, asks questions, responds to uncertainty, handles disagreement and manages their own ego.

In the trusted-advisor tradition of David Maister, Charles Green and Robert Galford, trust is strengthened by credibility, reliability and relational safety, and weakened by self-orientation. In practical terms, the client asks: Is this advisor competent? Does this advisor do what they promise? Can I speak honestly here? Is this advisor focused on me, or on proving themselves right?

Low self-orientation is essential. It means that the advisor does not rush to appear intelligent, win the discussion, control the conversation or protect their own status. Instead, the advisor keeps attention on the client's question and the purpose of the conversation.

Trust-building behaviour

- Be reliable: do what you say, keep agreements and make follow-up explicit.
- Be credible: use expertise clearly, but connect it to the client's world.
- Be open and honest: name relevant tensions, risks and uncertainty when needed.
- Reduce ego-noise: postpone the need to be right until the client has been fully heard.
- Create relational safety: make it possible for the client to share doubts, concerns and hidden interests.

4. The focus triangle: client, advisor and question

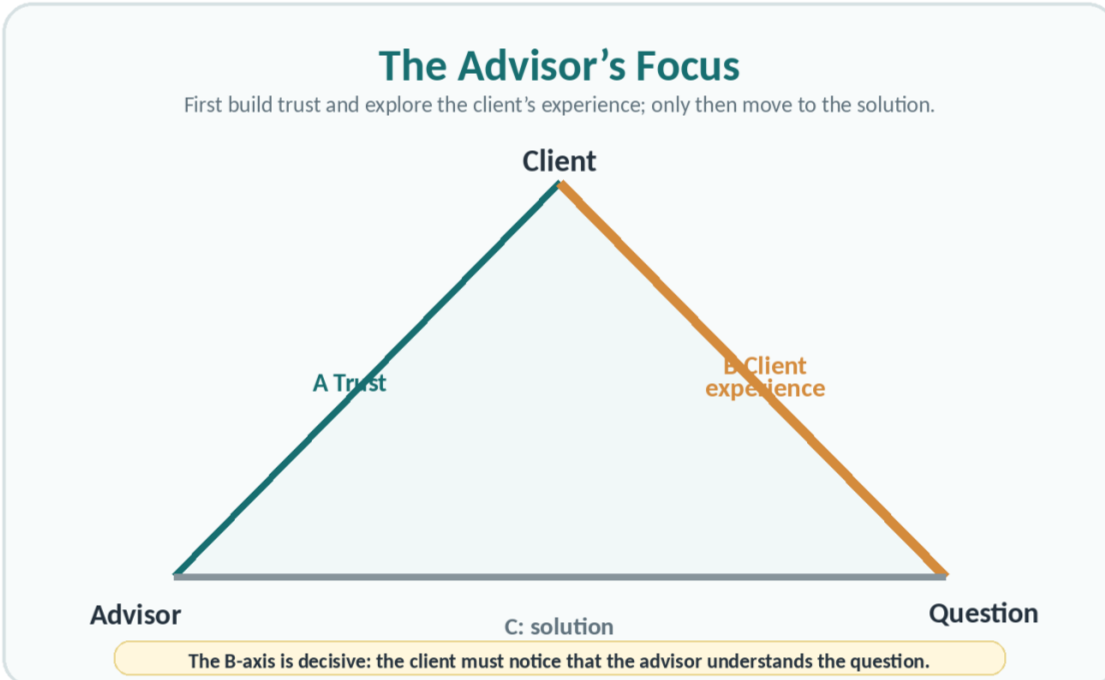

Figure 3. A skilled advisor works first on trust and client experience, then on the solution.

The triangle distinguishes three lines of attention. The A-axis is the client's trust in the advisor. The B-axis is the client's experience of the question. The C-axis is the advisor's ability to solve the question. Many advisors feel most comfortable on the C-axis because it is the place of expertise and solution-making.

However, the B-axis is often decisive for acceptance. The advisor must understand the client's experience of the issue: what matters, what has already been tried, what is feared, what interests are at stake and what assumptions are shaping the client's position. Only when the client recognises that this has been understood does the advisor have sufficient space to advise well.

Key distinction The advisor may understand the problem early. The client may need more time to experience that the advisor understands it. The difference between these two moments is where the art of advising begins.

5. The structure of an advisory conversation

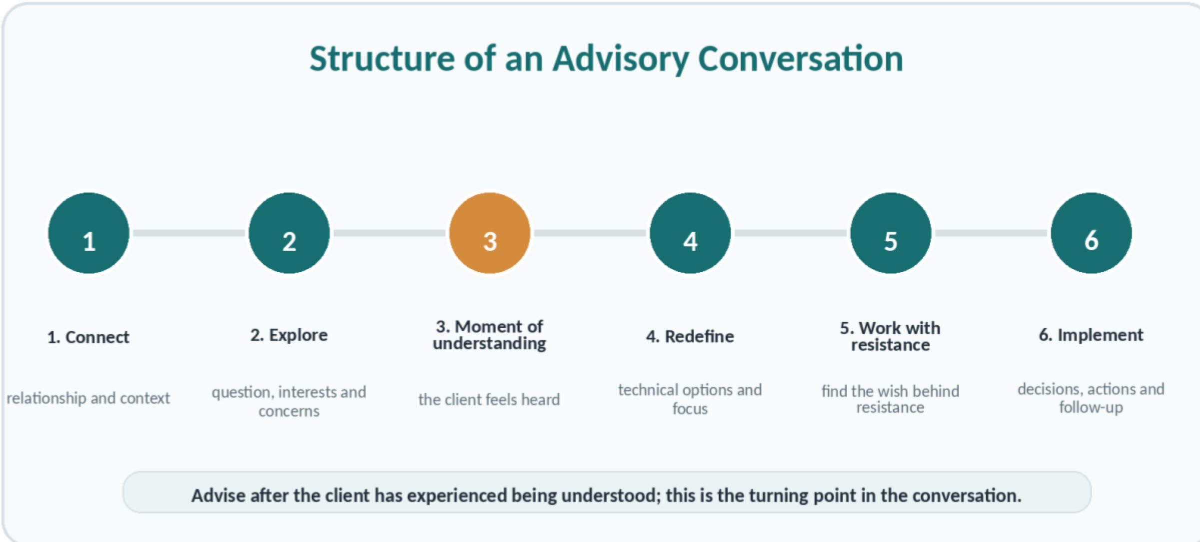

Figure 4. The advisory process moves from connection and exploration to implementation.

Phase 1: Connect

The opening phase creates a level playing field. The purpose is not small talk for its own sake, but relationship-building, orientation and calibration. The client forms early impressions: Does this advisor listen? Can they ask useful questions? Are they both independent and connected?

Phase 2: Explore the problem

The advisor investigates the problem as the client experiences it. At this stage the advisor does not need to agree with the client's interpretation. The professional task is to understand it fully and without premature judgement. This is where the acceptance process truly begins.

Two processes are active at the same time. First, the advisor models the behaviour later required from the client: listening, slowing down, structuring and reflecting. Second, the client feels heard and therefore becomes more willing to listen in the advice phase, even when the recommendation differs from the client's initial expectation.

Phase 3: The moment of understanding

When the exploration phase has been completed well, the client begins to experience that the advisor has understood the question. This is a turning point. The client usually relaxes because they no longer need to keep adding information, defending the importance of the issue or correcting the advisor's frame.

This relaxation is visible in quieter speech, fewer interruptions, more eye contact and a greater willingness to think with the advisor. From that point, the conversation can shift from "let me explain my problem" to "let us examine possible routes".

Phase 4: Redefine the question

After the moment of understanding, the advisor can ask more technical or content-driven questions. These questions are often open-ex questions: they help the advisor collect information needed to design a responsible recommendation. The question may also be redefined if a deeper or different problem has emerged.

Phase 5: Work with resistance

Resistance should not be treated as irrational opposition. It often signals that the client wants, fears or protects something that has not yet been sufficiently recognised. The advisor's task is to slow down, name the resistance respectfully and explore the wish or concern behind it.

Phase 6: Implement and follow up

The final phase translates advice into decisions, actions, responsibilities and follow-up. Without implementation discipline, even accepted advice remains abstract. A professional advisor therefore closes the conversation with clarity about next steps, risks, ownership and timing.

6. Core conversation skills: LSD

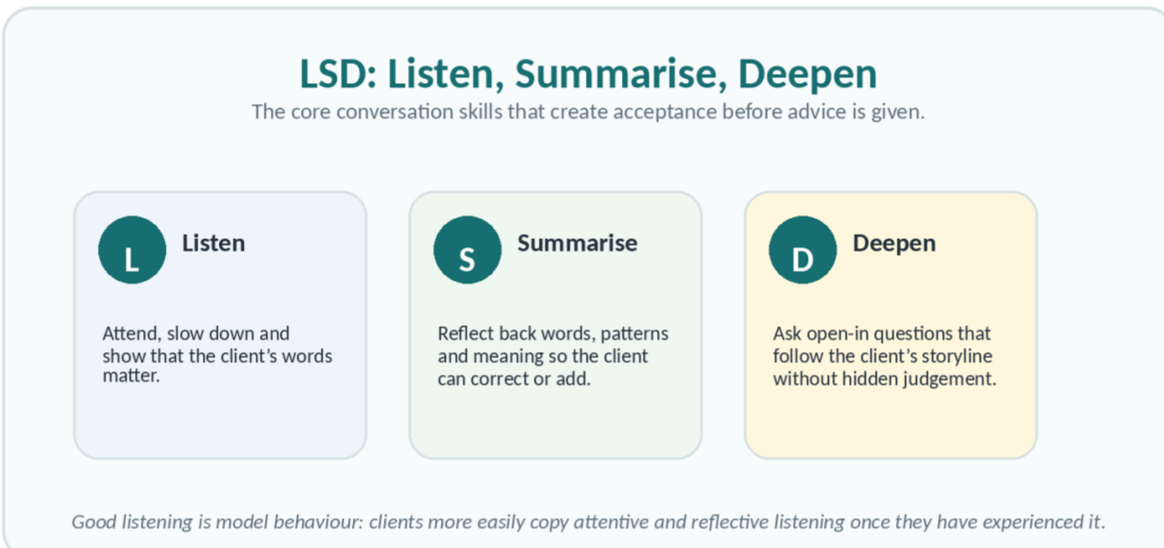

Figure 5. Listen, summarise and deepen: the conversation skills behind acceptance.

Listening

Listening is more than being silent. It is an active professional stance: attention, patience, eye contact, verbal signals, non-verbal presence and the discipline not to complete the client's thinking too early. Good listening is also model behaviour. The client sees how careful listening works and can later copy that behaviour when the advisor presents the analysis.

Summarising

Summarising is not only a closing recap. It also happens in short interventions during the conversation: repeating key words, naming patterns, structuring the client's story and checking whether the meaning has been understood. A good summary helps the client think more clearly.

Deepening through open-in questions

Deepening means asking questions that continue the client's line of thought. These open-in questions contain no hidden judgement and do not steer prematurely to the advisor's preferred solution. Examples include: "What makes this important now?", "What have you already considered?" and "What would make this a good outcome for you?"

Open-ex questions come later. They are used when the advisor needs additional technical information in order to assess options, consequences and feasibility. The distinction matters: open-in questions build understanding and acceptance; open-ex questions support professional diagnosis and solution design.

7. The moment of understanding

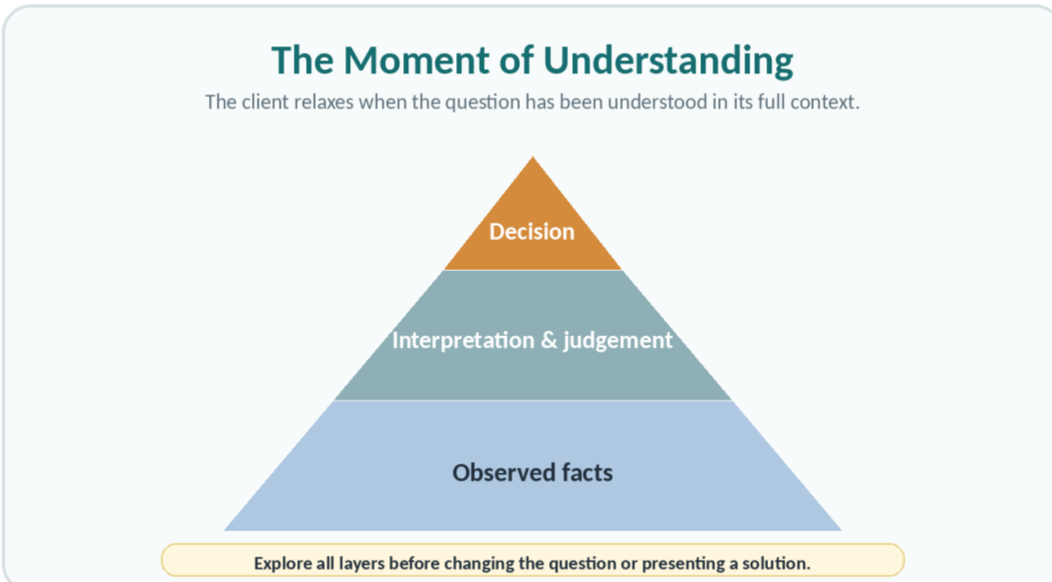

Figure 6. The advisor explores facts, interpretations and decisions before advising.

The moment of understanding occurs when the client experiences that the advisor understands not only the visible facts, but also the interpretations, judgements and decisions attached to those facts. The advisor has then understood the question in the client's world, not only in professional terms.

Until this point, clients often provide additional information. This is not a disruption; it is a signal. The client may be indicating that the full scope or significance of the problem has not yet landed with the advisor. Professional discipline means receiving this information rather than rushing past it.

Once the moment of understanding has been reached, the advisor gains permission to influence. The client can listen more openly to a different analysis or a route that was not originally expected.

8. Redefining the question and working with resistance

Redefining the question is a professional act. The advisor may discover that the original question is too narrow, too operational, based on a weak assumption or connected to a deeper organisational issue. Redefinition is only acceptable when the original question has first been genuinely understood and acknowledged.

The same applies to resistance. If the advisor argues against resistance too quickly, the conversation becomes a contest of persuasion. If the advisor explores resistance, it becomes information. What is the client protecting? What risk is being perceived? What value or interest is behind the hesitation?

Working principle Resistance is often a request for something else. Find that request before trying to convince.

9. The communication ladder

Figure 7. Content, procedure and process are three different levels of communication.

Advisory conversations operate on three communication levels. The content level concerns what is being discussed. The procedure level concerns how the conversation is being structured. The process level concerns what is happening between advisor and client.

When a discussion gets stuck at content level, the best intervention is often not more content. The advisor may need to clarify the procedure, or to name the process: "I notice we are both trying to convince each other. Would it help to step back and examine what concern is behind this?" Such process interventions require tact, but they can restore trust and movement.

10. Implementation and follow-up

An advisory conversation is not complete when the recommendation has been explained. It is complete when the client knows what has been decided, why it matters, who will act, when follow-up will occur and how progress will be assessed.

- State the decision and the reason behind it.
- Translate the advice into concrete actions, owners and deadlines.
- Identify risks, uncertainties and signals that require adjustment.
- Agree on a follow-up moment to evaluate whether the solution works.
- Return to any concerns that were visible during the conversation.

If the process becomes disturbed at any point, the skilled advisor returns to exploration. Doing so is not a step backwards; it is a way to restore trust, understanding and acceptance.

Practical checklist

Focus	Question
Before advising	What does the client think the question is? What makes it important? What is at stake?
During exploration	Have I listened, summarised and deepened before moving to a solution?
Moment of understanding	Does the client show signs of relaxation and recognition?
Redefinition	Have I acknowledged the original question before changing it?
Resistance	Have I explored the wish or concern behind resistance?
Implementation	Are actions, owners, timing and follow-up explicit?

Reflection questions

1. Describe a situation in which technically strong advice was not followed. Which part of acceptance was missing?
2. Which forms of self-orientation do you recognise in your own advisory style: rushing, wanting to win, wanting to appear clever, or avoiding uncertainty?
3. Formulate three open-in questions for a client who already has a preferred solution.
4. How can you test whether the moment of understanding has been reached without steering the client?
5. When a conversation gets stuck, which level is involved: content, procedure or process?
6. How can you make implementation concrete while keeping ownership with the client?