



# HOW TO ACHIEVE THE 5 STAGES REQUIRED TO BUILD TRUST

LATZ  
NEGOTIATION

By Marty Latz

I recently sat in on a lecture from Rob Galford, co-author of “The Trusted Advisor,” which explains how to achieve professional success by earning clients’ trust and confidence. Since all negotiations involve trust, and a broad view of negotiation includes dealing with clients, I was particularly interested in his five stages of building trust.

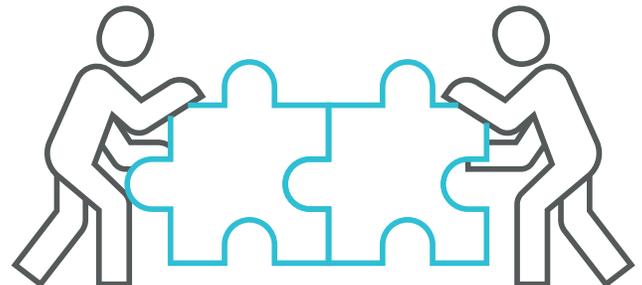
Each stage includes elements critical to most negotiations, especially those involving clients and future relationships between the parties.

## 1. Engage

According to Galford, the first trust-building stage, engagement, takes place when there is an issue worth discussing, and a person is worth talking to on that issue. It is when the client and advisor (possibly a lawyer, consultant, or other professional), or perhaps two potential partners in a negotiation, recognize that they have mutual interests that can be explored and possibly satisfied.

Perhaps the client just came into an inheritance and requires financial advice, or a business owner decides to sell her company and requires investment banking expertise. A want or need exists, and the advisor/negotiation counterpart engages sufficiently to take talks to the next level.

Bottom line: You can’t build professional trust or negotiate successfully without initially engaging on your counterpart’s issues or needs and getting them to open up with you.



## 2. Listen

I tell all my training program attendees that negotiation power goes to those who ask and listen, not those who argue and persuade.

Galford suggests this is the stage where the client (or negotiation counterpart) feels heard and understood. And it involves more than just asking questions. It requires, as noted in “The Trusted Advisor,” “active, incisive, conscious, involved and interactive” listening, both verbal and non-verbal.

Being able to listen and ensure your counterpart actually feels heard and understood are some of the most critical qualities in a successful negotiator – and an essential component of building trust.

### 3. Frame

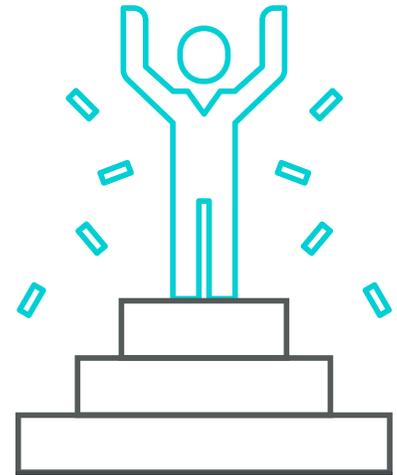
“That’s my issue or problem exactly,” is what you want your counterpart to say in the framing stage. Why? Because it illustrates your understanding of your client’s or counterpart’s true interests and needs, organizes or reorganizes the issues into an appropriate frame of reference, and sets forth an agreed-upon basis for moving forward.

I once had a client selling his company tell me that the buyer really understood him and his motivations. Because my client was considering a position running a division of the buyer’s company upon the sale, this was a crucial element in the negotiation. It went a long way toward building trust and framing the negotiation issues required for both parties to successfully move forward.

### 4. Envision

What does success really look like at the end of the day in terms of specific, achievable goals? When advisors and clients jointly envision this type of successful result, according to Galford, it takes trust to the next level.

I agree. Negotiation parties need to set specific, achievable goals too. Likewise, they must step into their counterpart’s shoes and envision their goals. If these are aligned and the parties explicitly recognize this, it can make a big difference.



### 5. Commit

The final stage involves identifying and gaining the client’s or parties’ realistic commitment to the practical steps needed to achieve their goal. Advisors gain trust, according to Galford, by helping clients truly understand what it will take to achieve their vision.

A fundamental component of strategic negotiations likewise involves a real commitment to achieving your goals. Only then can you design a strategic way to get there and identify the tactics most likely to get you that desired end result.

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ABC News Anchor George Stephanopoulos has called Marty Latz “one of the most accomplished and persuasive negotiators I know.” As the founder of LATZ Negotiation, Marty has trained over 100,000 business professionals and attorneys from around the world, how to more effectively and successfully negotiate.

Latz is the author of *Gain the Edge! How to Negotiate to Get What You Want*, and has appeared as a negotiation expert on CBS, CNN, and Fox News. Latz also negotiated for The White House nationally and internationally on The White House Advance Teams. He also has written a monthly negotiation column for various newspapers since 1999.

Latz received his law and negotiation training from Harvard Law School, where he graduated *cum laude*.

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