



Hoosier Hills Estate Planning Council

www.hhepc.org

**If you want to be trusted...
radically listen**

Sam Ardery May 17, 2024

Living with Three people



YOU



ME



YOUR EGO



It's not all about me!

P.A.R.C.

Pause

Take a
breath;
step back,
focus

Assess

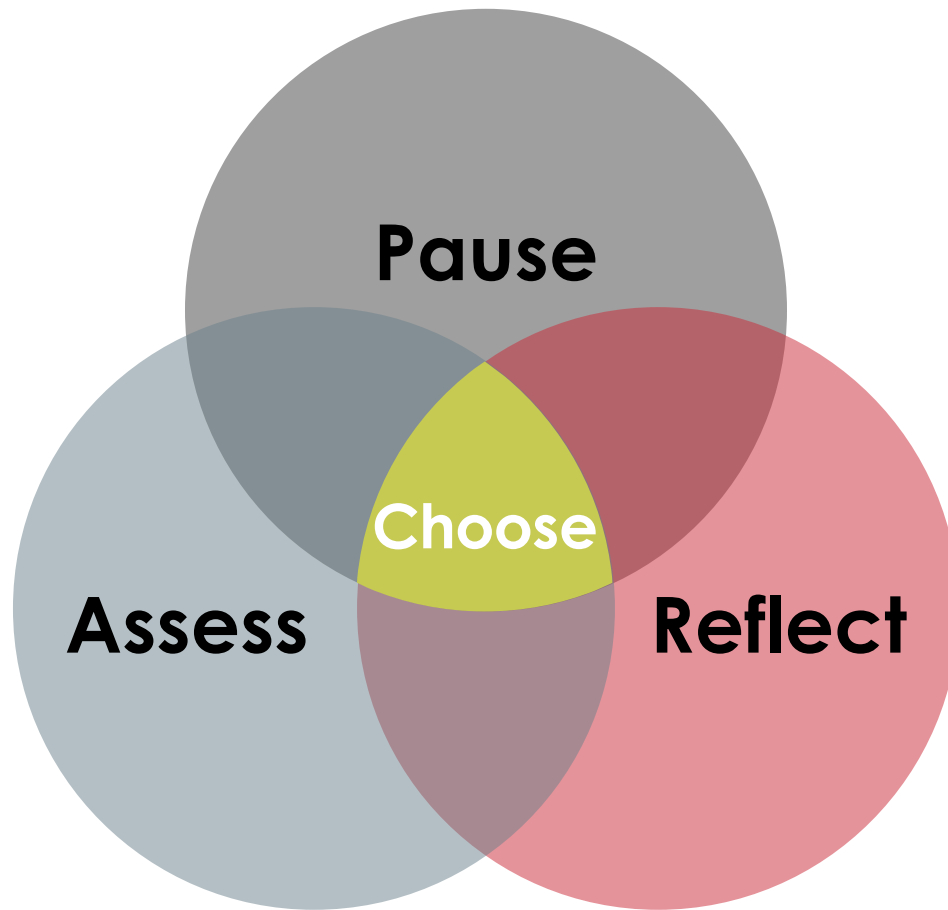
Perception of
facts

Reflect

Context,
consequences,
personality,
options

Choose

Balance
tradeoffs



“I don’t like that man; I need to get to know him better.

HHEPC 2024



Good talk, bad follow-up.





The art of listening



Getting Fired

HHEPC 2024

9

This Photo by Unknown Author is licensed under [CC BY-SA-NC](https://creativecommons.org/licenses/by-sa/4.0/)

The Omnivore's Dilemma

A NATURAL HISTORY of FOUR MEALS

"Thoughtful, engrossing... you're not likely to get a better explanation of exactly where food comes from." —*The New York Times Book Review*

MICHAEL POLLAN

Author of the #1 *New York Times* Bestseller
IN DEFENSE OF FOOD



Mistake we make

...to think that all we do know is all we can know.

Michael Pollan, *The Omnivore's Dilemma*

Four Kinds of Listening*

1. To Learn
2. To Understand
3. To Fix
4. Radical Listening, *no agenda***

*Your go to?
About you or them?*

*1-3 *Are You Listening*, by Kate Murphy

**4 *Positively Conflicted*, by Sam Ardery



Ever felt:

1. Really listened to at a cellular level?
2. Why?
3. How did it feel?



Three conversations*

1. What is the conversation about?

- *Decision making*

2. How do we feel?

- Emotional mind-set

3. Who are we

- Social mindset

**Super Communicators*, by Charles Duhigg



Want to listen better?

1. **Turn off your phone** and put it out of sight, there is no multitasking.
2. Listen with **curiosity** and without agenda.
3. **Test** what you are hearing with the speaker—looping.



Improve

“Attention is the rarest and purest form of generosity.”

Simone Weil





Who do people trust?
Hint...it's not the talkers.



It depends



Trust

**Where's my Uber...
no one to call!**



Trust Equation

$$\text{Trust} = \text{credibility} + \text{reliability} + \text{vulnerability}^*$$

self-interest

Source: David Maister, *The Trusted Advisor*, (New York, Free Press, 2000)

*intimacy instead of vulnerability



Trusting and judging...



Experiment shows:

- 1. Most Cheat**
- 2. Excuse me**
- 3. Judge you**

David DeSteno, Ph.D. Northeastern University

The state of people who seek our services



Why do
people
consult us?

We fear:

- 1. Losing what we have, or**
- 2. Not getting what**



Where there is money and conflict...



**Investment
advisors**



Lawyers

A green rectangular sign with rounded corners and a white border, mounted on two wooden posts. The sign features the word "Uncertainty" in a large, white, sans-serif font, with "Just Ahead" in a smaller, white, sans-serif font below it. The background of the sign is a solid green color. The sign is set against a cloudy, overcast sky.

Uncertainty
Just Ahead

**What to do
when
uncertainty
is
everywhere**

Sam Ardery **Positively
Conflicted**



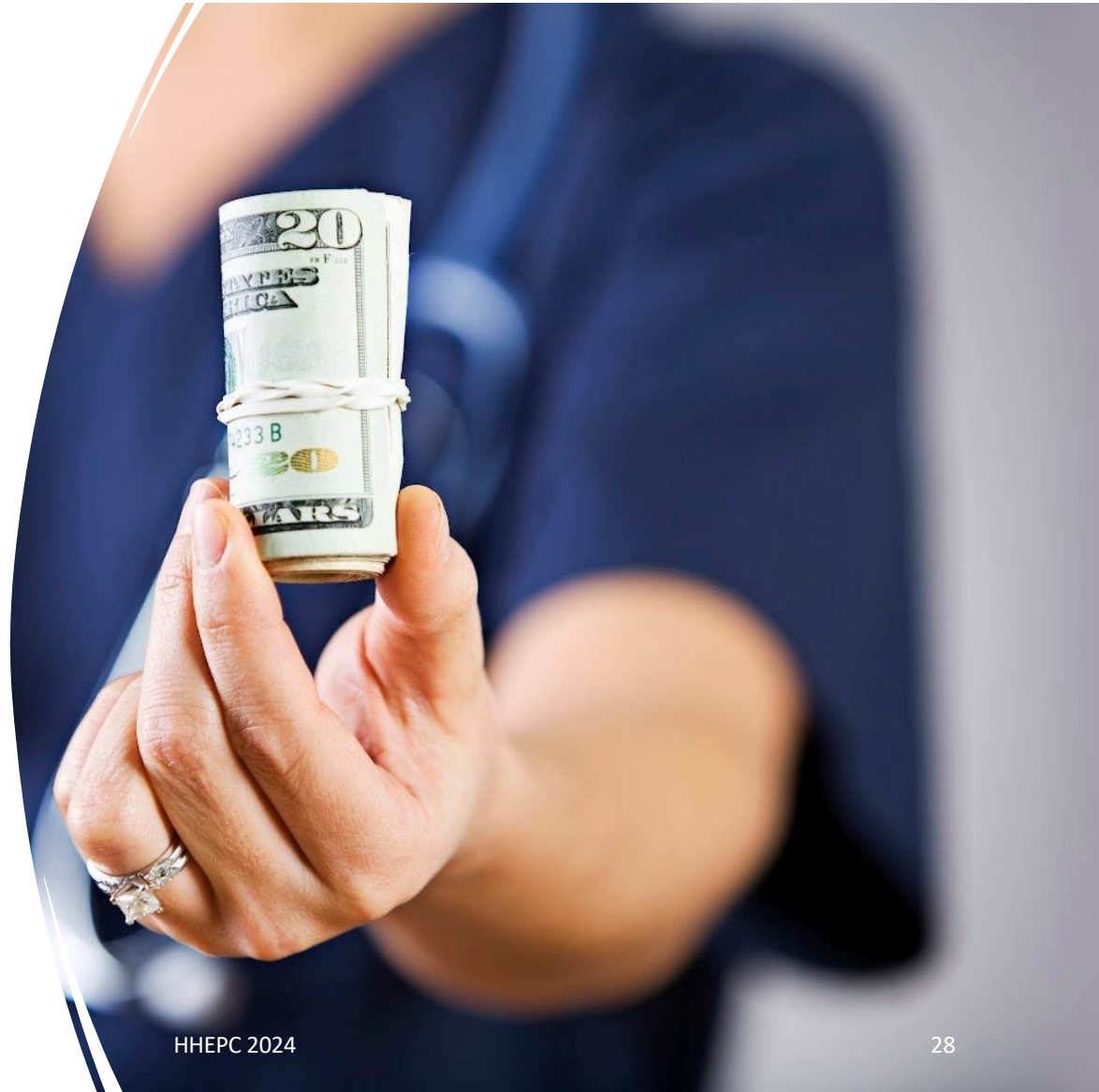


Anxiety is the universal human response to a situation that is challenging with an uncertain outcome.

Michelle Kloster, Ph.D.

**Not financial insecurity
but...
FEAR of financial
insecurity.**

\$10M problem





Four questions

- Why people come to you?
- Difference between a transaction and a relationship?
- What is your job?
- Is a profession different from sales and other services?

Discuss at your tables

Trust Equation

$$\text{Trust} = \text{credibility} + \text{reliability} + \text{vulnerability}^*$$

self-interest

Source: David Maister, *The Trusted Advisor*, (New York, Free Press, 2000)

*intimacy instead of vulnerability

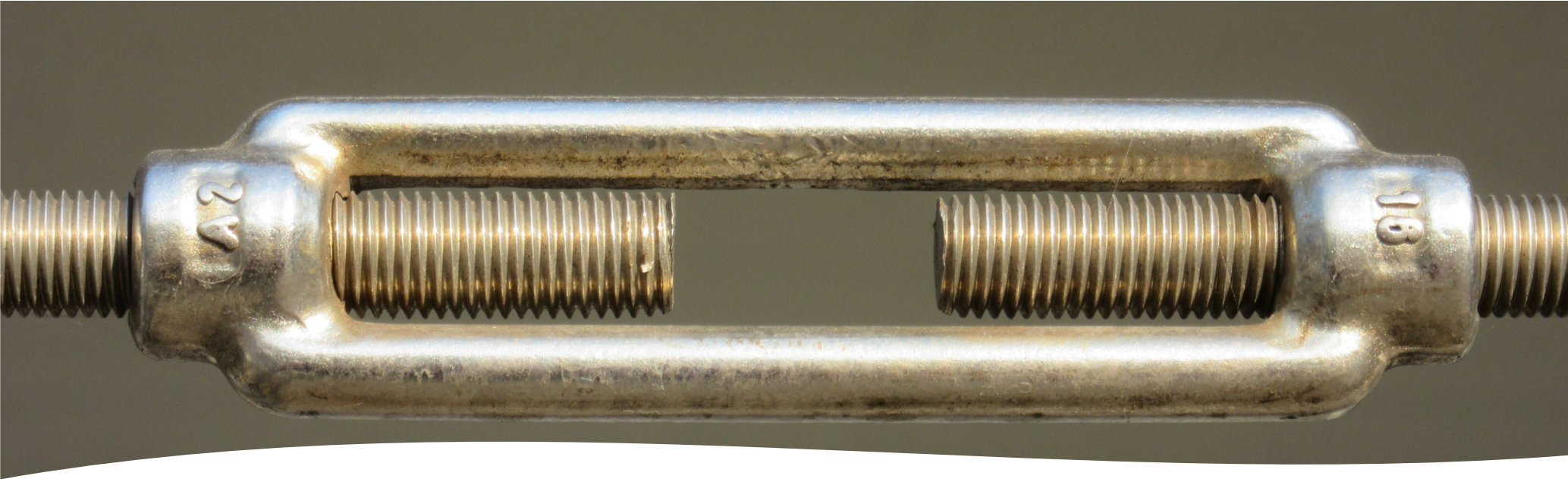
BY PRODUCTS OR GOALS?



By-Products



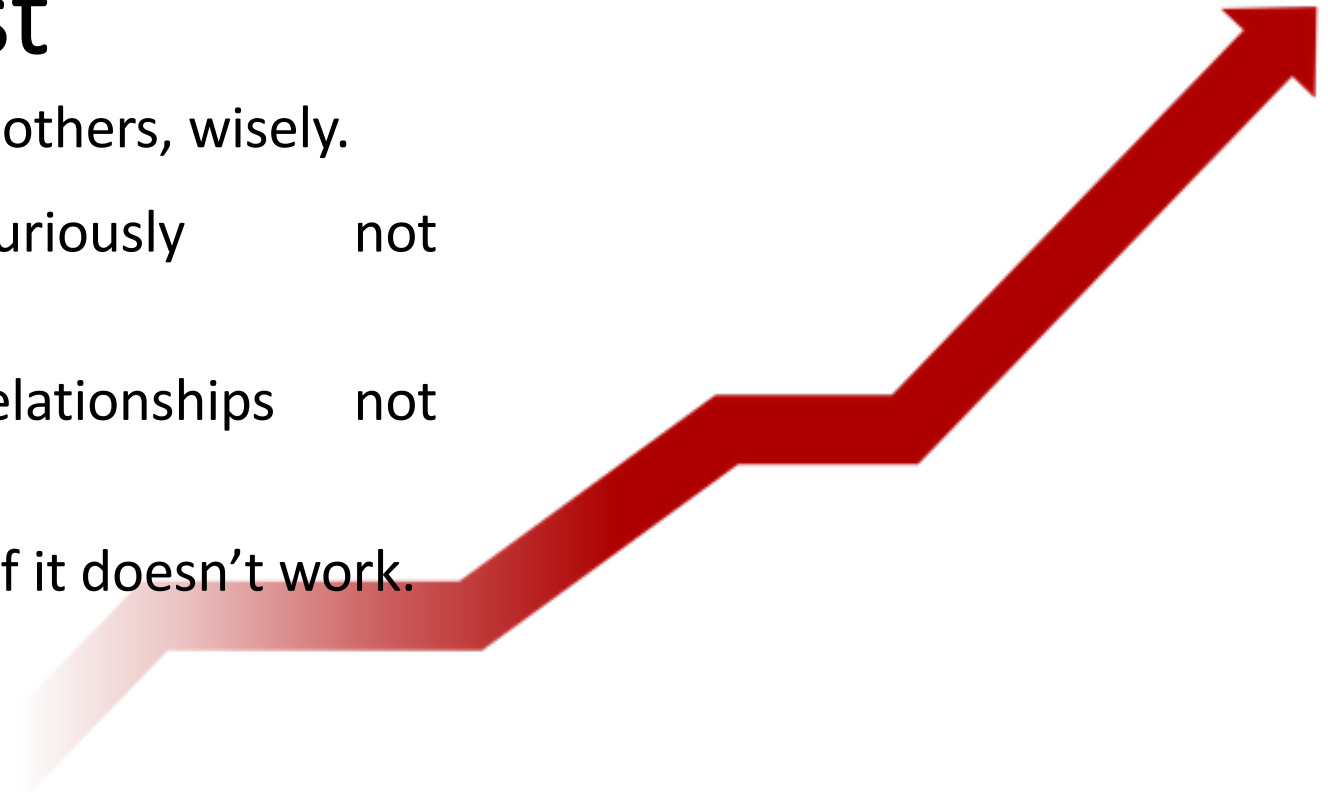
Goals



**Natural tension between getting
business and doing the job.**

Grow Trust

1. **Choose** to trust others, wisely.
3. **Explore** curiously not judgmentally.
4. **Invest** in relationships not outcomes.
5. **Own your part** if it doesn't work.



Student asked, “biggest failures?”

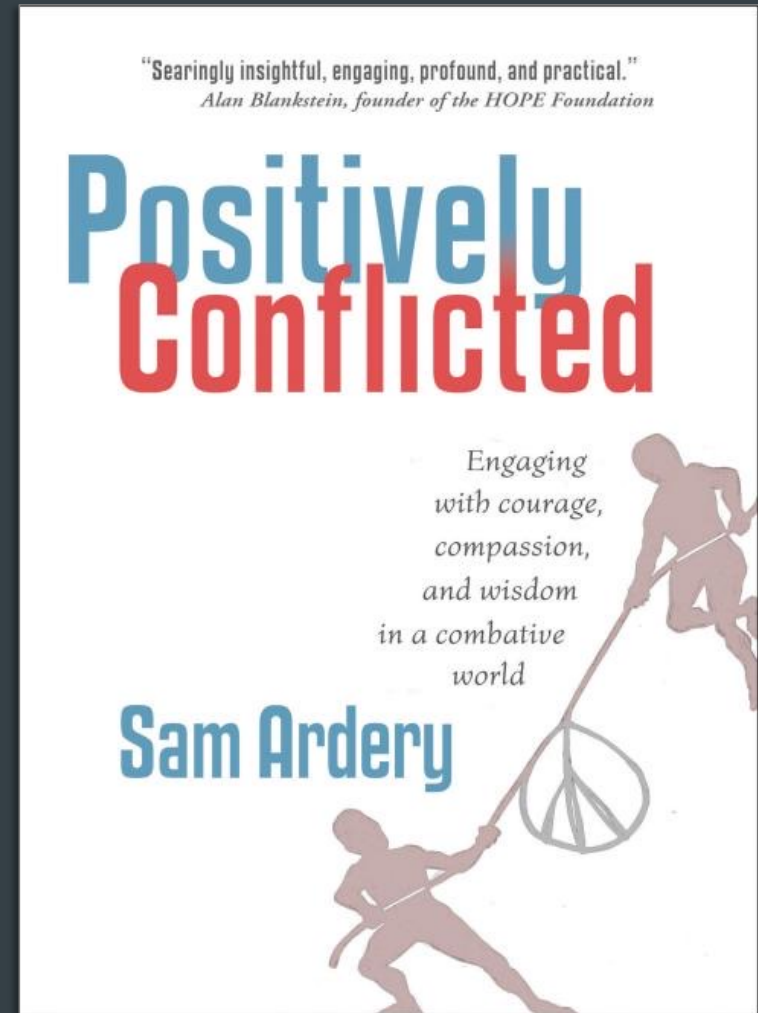


Thank you

Sam Ardery

Sardery@lawbr.com

Samardery.com



Traits and emotions travel together

Joy Sadness Anxiety
Justice Entitlement Revenge
Acceptance Fear Contempt
Compassion Courage
Humility Arrogance