

TOOLKIT #6

The Trusted Advisor Meeting

Prepare and run donor and partner meetings that build trust, not just the next ask.

A Lever & Core toolkit

Drawing on Maister, Green & Galford (The Trusted Advisor)

Every complex organization is inherently simple.

01 · WHAT IT IS

Meetings that build trust before they ask for anything

Most donor meetings are prepared as presentations: what we will say and what we will ask for. The meetings that build long relationships are prepared around the other person, and around the trust they need to feel before they commit.

What it is

A preparation and debrief tool for meetings with major donors, foundation officers, corporate partners and institutional allies.

It uses the **trust equation**, a simple model that breaks trust into four parts you can work on: three that build it and one that erodes it.

You use it before the meeting to plan, during the meeting to stay on track, and after it to decide what to follow up and what to do better next time.

When to use it

- A first meeting with a prospective major donor or foundation.
- A renewal or upgrade conversation.
- A meeting after something went wrong: a delay, a missed report, a change of plan.
- A partnership conversation where both sides are cautious.
- Preparing a colleague or board member who will join you.

You walk away with

- A one-page plan for the meeting
- The questions you will ask, and what to listen for
- A clear view of what could make you sound self-interested
- One next step you are sure you can keep
- A short debrief habit that improves every meeting

At a glance

30–45 minutes to prepare, alone or with a colleague.

10 minutes to debrief, within a day of the meeting.

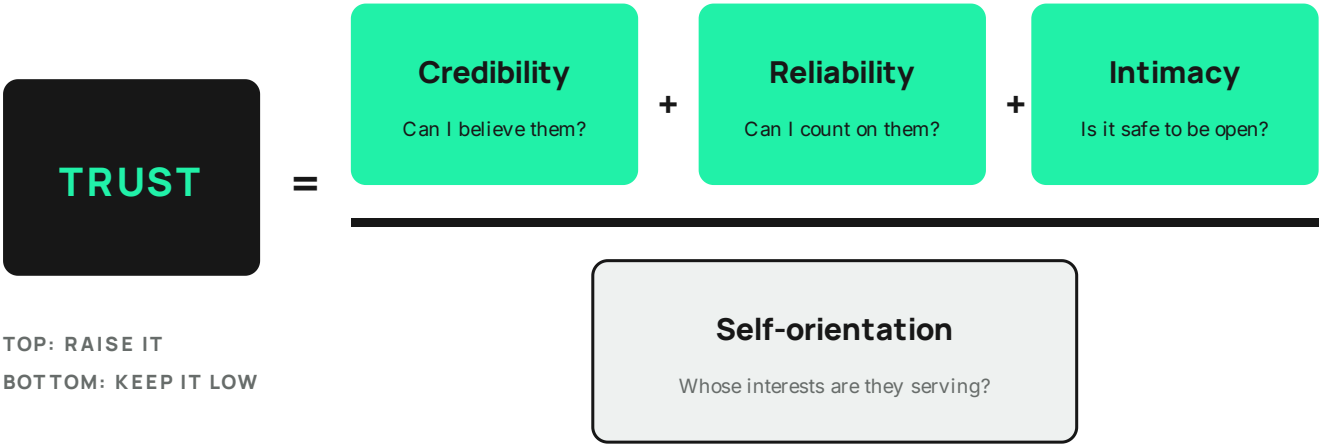
Works for one-to-one meetings and small team visits, in person or online.

Source. The trust equation and its four components come from David H. Maister, Charles H. Green and Robert M. Galford, *The Trusted Advisor*, written about professional advisors and their clients. This toolkit is an original adaptation by Lever & Core for fundraising and partnership meetings in mission-driven organizations.

02 · THE FRAMEWORK

The trust equation

Trust grows with what sits on top of the equation and shrinks with what sits underneath. The bottom matters most: the more a meeting is about you, the less the other three count.



TOP: RAISE IT

BOTTOM: KEEP IT LOW

Credibility: "Can I believe what they say?"

Knowing your facts, being honest about what you do not know yet, and speaking about the work with precision rather than slogans.

Reliability: "Can I count on them?"

Doing what you said, when you said it. The report sent on the promised date, the call returned, small promises kept over time.

Intimacy: "Is it safe to be open with them?"

The donor's sense that they can share real concerns, doubts or personal motivations and that you will handle them with care. Built by listening, discretion and genuine interest.

Self-orientation: "Whose interests are they serving?"

Attention on your own needs: the target, the ask, looking good, being right. It shows up as talking too much, rushing to the ask, or getting defensive.

What this means for fundraisers. You cannot build trust by talking more about your organization. You build it by being precise, keeping small promises, listening well, and making the ask serve the donor's own goals.

03 · STEP BY STEP

Before, during and after the meeting

1

Before · Research the person, not just the prospect

What do they care about? What have they supported before, and why? Write one sentence: what would make this meeting worth their time?

Ask: What hope or problem are they bringing to this meeting?

2

Before · Set a goal that is bigger than the ask

Choose one outcome for them (something they understand, see or decide) and one for you (learn their priorities, agree a next step).

Ask: If money were never mentioned, what would still make this a good meeting?

3

Before · Plan each part of the equation

Credibility: the two or three facts you must get right. Reliability: what you promised last time, and whether it was done. Intimacy: two open questions. Self-orientation: what might make you sound self-interested, and how you will avoid it.

4

During · Open with them

Check their time and what they want from the meeting. Ask your open questions early, listen more than you speak, and note the words they use.

Ask: What would you need to see to feel confident about this?

5

During · Reflect, then propose

Summarize what you heard in their terms before presenting anything. Connect your work only to what they said matters. Make the ask or next step clearly, then stop talking.

6

During · Agree one next step you will keep

Close with a specific, dated follow-up that you control. Promise a little less than you could deliver.

7

After · Debrief within 24 hours

Score each part of the equation from 1 to 5, write down what you learned, send the follow-up you promised, and note one thing to do differently.

Online meetings. The same plan works on a video call. Keep it shorter, ask your first open question within the first few minutes, and send the follow-up the same day.

Two of you in the room? Agree beforehand who leads, who asks the open questions and who takes notes, so the donor talks to a team, not two pitches.

04 · WORKED EXAMPLE

A renewal meeting after a late report

TYPICAL SCENARIO

A composite situation that shows the pattern. It is not a client and does not describe any real organization or person.

THE SITUATION	The program director of a community health NGO is meeting the program officer of a family foundation that funds its home-visiting program. The last progress report went in late, and the renewal decision is coming up.
THE OLD PLAN	A long slide deck of program results, with a request for a larger grant in the first ten minutes.
CREDIBILITY	Two results the team can document, plus one question it cannot answer yet, stated honestly.
RELIABILITY	Raise the late report first, before the officer does. Explain the cause in one sentence and show the new reporting calendar that is already in place.
INTIMACY	Two open questions: “What is your board looking for in this round?” and “What has been hardest for you in working with us?”
SELF-ORIENTATION	The risk was rushing to the larger grant. The decision: no ask in the first half; propose renewal at the current level, with growth as an option tied to whatever the officer says matters.
IN THE MEETING	The officer explains that her board wants to see that the program can last beyond the foundation’s support. The director proposes adding a short sustainability plan to the renewal, and agrees to send a draft on a date she knows she can keep.

> **Debrief note:** owning the late report early turned a weak point into proof of reliability. The next step serves the funder’s own board, not only our budget.

05 · WORKSHEET

Meeting plan and debrief

Meeting with | Date | Our team

THEIR WORLD

What do they care about? What would make this meeting worth their time?

MEETING GOALS

One outcome for them · one outcome for us · the ask or next step, if any.

C CREDIBILITY

The facts we must get right. What we do not know yet, and will say so.

R RELIABILITY

What we promised last time. Was it done? What will we acknowledge?

I INTIMACY

The open questions we will ask. What we will listen for.

S SELF-ORIENTATION

Where we might sound self-interested, and how we will avoid it.

→ THE NEXT STEP WE WILL COMMIT TO

What, by when, and who owns it. Something we fully control.

✓ DEBRIEF, WITHIN 24 HOURS

Score 1 (weak) to 5 (strong). For self-orientation, 5 means we kept it low.

Credibility ☐1 ☐2 ☐3 ☐4 ☐5

Reliability ☐1 ☐2 ☐3 ☐4 ☐5

Intimacy ☐1 ☐2 ☐3 ☐4 ☐5

Self-orientation ☐1 ☐2 ☐3 ☐4 ☐5

What we learned · follow-up sent? · one thing to do differently

06 · FOR THE FACILITATOR

Tips and common mistakes

Use this sheet to coach a team or a board member before a meeting. Most of the value is in the preparation conversation, not the form.

Facilitator tips

Prepare questions, not just slides

Every meeting plan should have at least two open questions written out word for word. They are what make the meeting about the other person.

Listen for their words

Write down the exact phrases the donor uses, and use them in your follow-up. It shows you heard them.

Own problems first

If something went wrong, say so before they raise it. Few things build reliability faster.

Keep promises small and specific

"I will send it on Thursday" builds more trust than "we will be in touch soon", as long as Thursday happens.

Brief the volunteer leader

When a board member joins, agree the roles beforehand: who opens, who asks, who listens and takes notes.

Common mistakes

Pitching in the first five minutes

Opening with the ask signals that the meeting is about your target, which is self-orientation at its most visible.

Answering questions nobody asked

Over-explaining reads as nerves or as selling. Answer the question, then check whether it helped.

Faking certainty

A guessed figure damages credibility more than "I will check and send it to you tomorrow".

Treating the gift as the finish line

The meetings after a commitment are where reliability is proven, and where the next commitment begins.

Skipping the debrief

Without notes, the next meeting starts from zero and the same mistakes repeat.

> **Over time.** Keep the debrief scores with your donor notes. After several meetings, the pattern shows which part of the equation your team most needs to work on.

Want help running this with your team?

Lever & Core — Uriel Edery

We help NGOs and mission-driven organizations find the few things that really limit their impact, and build simple, focused ways of working around them.

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