

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.

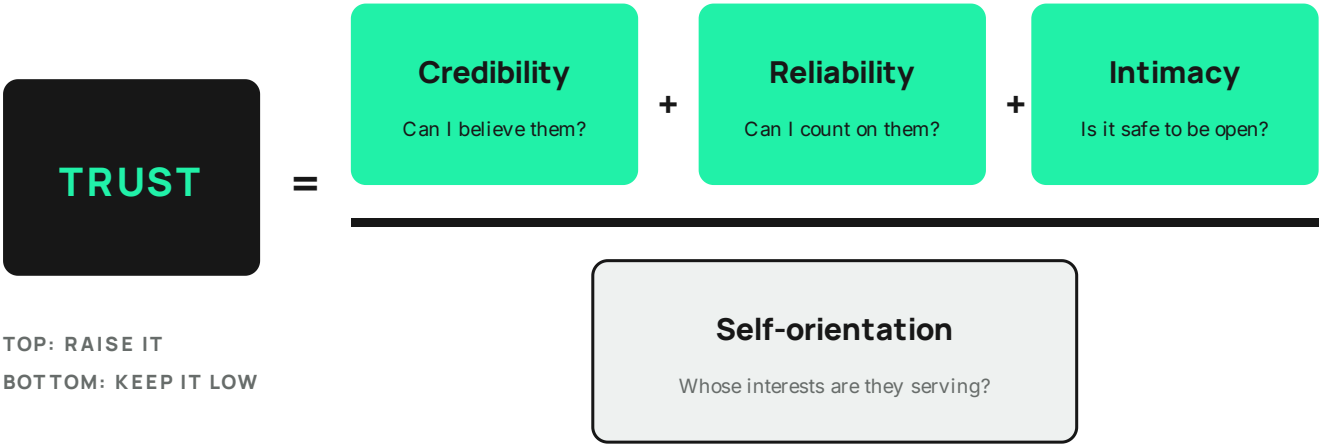
Works for one-to-one meetings and small team visits, in person or online.

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.