Category

Consulting

Trusted Advisor Conversations Playbook

Framing, reframing, and challenging client thinking without damaging the relationship that makes the challenge worth hearing

- Practitioner
- Intermediate
- Template Included

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- 4 minute(s)

Overview

A framework for specific conversation techniques — framing a new perspective, reframing a client's stated problem, and challenging their thinking constructively — that trusted advisors use to add genuine value beyond simply agreeing with or executing on the client's initial framing.

Isn't challenging a client's thinking risky for the relationship?

Done poorly, yes — but done well, using genuine techniques for framing and reframing rather than blunt disagreement, constructive challenge is often exactly what distinguishes a trusted advisor from an order-taker, and clients often value it once they experience it done skillfully.

How do you know when to challenge versus when to simply execute on

what the client asked for? When the client's stated problem or request seems to reflect an incomplete or potentially mistaken framing that, left unchallenged, would lead to a weaker outcome — this playbook's reframing technique is specifically for that situation, not for challenging every request.

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