



## Eight Key Lessons from an Oscar Winner

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*Like lost car keys, learning turns up in the most unexpected places. Sunday's Oscars were swept by *The King's Speech* – a movie which provides some powerful lessons for financial advisors.*

After a recent workshop on client leadership, I've been reading [\*The Trusted Advisor\*](#) by David Maister, Charles Green and Robert Galford. It's a comprehensive, well-structured handbook aimed at those in professional services who need to build and reinforce their business relationships.

Brimming with anecdotes, checklists and how-to tips, it's thorough and full of examples. Almost too thorough; no matter how many notes I made, and key paragraphs I underlined, it wasn't sticking. It's one of the shortcomings inherent in the handbook form – I needed something to make it *come alive*.

Then yesterday I went to see *The King's Speech*.

### **Movie masterclass**

Geoffrey Rush plays Lionel Logue, the Australian speech therapist who helped Prince Bertie, the Duke of York (Colin Firth) – and second son of King George V – to overcome a debilitating stammer. To make matters worse, his elder brother (David *aka* Edward VIII) abdicated the throne to marry a divorcee, and Bertie became king on the eve of World War II – at the time when the country needed a clear voice of leadership.

Like all great pieces of entertainment, it's a movie that works on multiple levels: It's the story of a man trying to conquer his demons. It's the portrait of a leader struggling to step up to his role. It's a study of class and social hierarchy. It's an essay on the impact of radio broadcasting on politics and society.

And it's a masterclass in becoming a trusted adviser. Here are eight scenes from David Seidler's original screenplay that beautifully illustrate many of the principles in Maister's book:



### **Lesson 1. Trusted advisors are consistent**

It is Bertie's wife, Elizabeth, who first approaches Lionel about treating her husband. She does so under the pseudonym of Mrs. Johnson. Bertie is direct and to-the-point with her:

LIONEL: Where's Mr. Johnson?

ELIZABETH: He doesn't know I'm here.

LIONEL: That's not a promising start

He tells her to have her hubby "pop by" to give his personal history, but she says "you must come to us."

LIONEL: Sorry, Mrs. J., my game, my turf, my rules.

ELIZABETH: And what if my husband were the Duke of York?

The penny drops for Lionel, but not his faith in his method and his success rate:

LIONEL: I can cure your husband. But for my method to work there must be trust and total equality in the safety of my consultation room. No exceptions.



It's testament to Helena Bonham Carter's performance that you can see the relief in her face. Here is an adviser that is different, confident and will not make exceptions. Whether addressing a commoner or royalty, he takes the same approach.

## **Lesson 2. Don't be afraid. Creating intimacy takes courage**

Obviously, this could be a flagship client for Lionel; in that era, the gravitational pull of deference would have been immense. But his method – his advice – is based upon a relationship of equals, which he makes very clear to Bertie when they first meet.

LIONEL: I was told not to sit too close. I was also told, speaking to a royal, one has to wait for the royal to choose the subject."

Cleverly, Lionel is already chipping away at the protocol; even Bertie acknowledges, with difficulty, that with him it could be a 'rather long wait.' It's a light moment before the inevitable conflict arises as the advisor tries to map out his territory, focusing on facts:

LIONEL: When did the defect start?

BERTIE: It's always been that way.

LIONEL: I doubt that.

BERTIE: Don't tell me! It's my defect.

LIONEL: It's my field. I assure you, no infant starts to speak with a stammer.

After setting out his stall – he is the expert – he goes on to provoke Bertie, because it breaks down barriers and is part of the solution; Bertie doesn't stammer when he's angry. It's hardly likely to be part of a client engagement strategy, but it's a memorable reinforcement of the need to be brave in the face of defensive aggression.



### **3. Illustrate, don't tell**

After provoking his potential client, Lionel sets him an exercise to record his voice (I'll spare you the details). The session ends frostily, with Bertie saying that the treatment is not for him.

However, in a scene shortly after, Bertie listens to the recording, and realizes that Lionel's methods – or at least his approach – can yield results.

No one has told him this; it's not on a testimonial. He has firsthand, personal evidence of success.

### **4. Earn the right to offer advice**

When Bertie returns to trial Lionel's methods, the royal couple set out their terms:

BERTIE: Strictly business. No personal nonsense.

ELIZABETH: I thought I'd made that very clear in our interview?

Lionel points out that the couple's request will result in dealing with the issue at surface level, and is told that it will suffice. So rather than be precious, he agrees to focus on breathing techniques, physical exercise and tongue twisters. We know that it won't

address the core problem, but this is Lionel's first steps in forming the relationship. He is earning the right to go further.

**Lesson 5. Focus on the client as an individual, not as someone who is filling a role.**

Halfway through the film, Bertie's father (King George V) dies. When client and advisor meet soon after, the conversation extends beyond the prescribed boundaries. As is his duty, Bertie has been presenting a formal face to the world, so he treats the meeting with Lionel as a form of release. Lionel learns much about his background, his upbringing, his relationship with his parents and his siblings – much of it the root causes of his impediment.

BERTIE: You know, Lionel, you're the first ordinary Englishman...

LIONEL: Australian.

BERTIE: I've ever really spoken to.

Of course, the subtext is that Lionel is the first person that Bertie has spoken to about these issues. Lionel has now reached the status of trusted advisor.



**Lesson 6. Be sure your advice is being sought**

The next time Bertie and Lionel meet, the prince is very angry with his elder brother. David is intent on marrying Mrs. Simpson, a divorcee, so putting heart before duty. If it happens, Bertie will become king.



BERTIE: I am not an alternative to my brother.

LIONEL: If you had to, you could outshine David...

Lionel reaches out and gives Bertie a pat of comfort on the shoulder. Bertie pulls back in offended shock.

BERTIE: Don't take liberties! That's bordering on treason.

LIONEL: I'm just saying you could be king. You *could* do it!

BERTIE: That *is* treason.

They face each other, as though in combat.

LIONEL: I'm trying to get you to realize you need not be governed by fear.

BERTIE: I've had enough of this.

LIONEL: What are you afraid of?

BERTIE: Your poisonous words.

Bertie strides away, leaving Lionel to realize that he is no longer advisor to the man who is likely to be king.

It's a brilliant scene, both dramatically and as illustration of a key point in client intimacy. No matter how close the relationship becomes, there will always be areas that are off limits. Here, advice should only be given when invited.

### **Lesson 7. When you need help, ask for it**

Events turn in the drama, leading to reconciliation between Bertie and Lionel. This happens at Lionel's home, where he is visited by the royal couple while his wife is out playing bridge. Which is just as well, as Lionel has not told her of his 'star' client.

Unfortunately, she returns home early, and finds Elizabeth in the dining room. Bertie and Lionel are in the parlor, in a scene that reveals the latter's vulnerability:

BERTIE: Logue, we can't stay here all day.

LIONEL: Yes we can.



BERTIE: Logue...

LIONEL: Look, I need to wait for the opportune moment.

BERTIE: (realizing) You're being a coward!

LIONEL: You're damn right.

Decisive, Bertie stands and throws open the door.

BERTIE: Get out there, man!

And so the advisor is advised.

### **Lesson 8. Just because the client asks a question, it doesn't mean it's the right question to answer**

Bertie's coronation is the first major test of Lionel's methods. He attends the preparations at Westminster Abbey, and gets a very cold reception from the Archbishop of Canterbury, who takes exception to this antipodean outsider. In the following scene, it's obvious that 'the establishment' has done some digging into Lionel's past, which they have fed to Bertie.

BERTIE: True, you never called yourself 'Doctor.' I did that for you. No diploma, no qualifications. Just a great deal of nerve.

How does Lionel respond? By pointing out that when he was developing his methods (to help shell-shocked soldiers returning from World War I) there *was* no training. He admits that he has no piece of paper, but asks Bertie to focus on his track record of results, and what they have achieved together.

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I'll stop at this point rather than spoil the end for those who haven't yet seen *The King's Speech*. I hope this post encourages you to do so, both as an emotionally charged historical biopic and as an object lesson in building Client relationships.

Maister, *et al.*, say of the trusted advisor role: "... virtually all issues, personal and professional are open to discussion and exploration. The trusted advisor is the person the client turns to when an issue first arises, often in times of great urgency: a crisis, a change, a triumph, or a defeat."

For any of us hoping to build such a relationship, there's plenty to learn from Lionel Logue.



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