

DAY 1

Adopt the Advisor Mindset

- ✓ First, read or listen to **Day 1: The Star of Your Show** in *It Starts with Clients* (pages 1-9 in the hardcover version).

Your subject-matter expertise is essential to success. But, it can also *limit* your effectiveness with clients if you succumb to the narrow, expert “mindset.” Remember: Clients hire experts, but they then go on to build long-term, trusted relationships with those select professionals who offer something *more*.

Part 1

What are your goals for this 100-Day Client Challenge? What would you like to accomplish?

Goal 1: _____

Goal 2: _____

Goal 3: _____

Part 2

On the next two pages, assess in which areas you tend to act with the “expert” mindset and in which areas you are able to project the “advisor” mindset.

Assignment

Self-Assessment: The Expert Versus the Advisor Mindset

In this exercise, you'll assess your strengths and weaknesses with regard to developing the “client advisor” mindset that is essential for becoming a trusted advisor.

Instructions: On the worksheet on the next page, indicate where you are on the spectrum, from left to right, for each characteristic. That is, for each area, are you closer to the “expert mindset” or the “advisor mindset”?

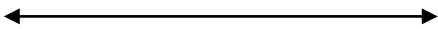
When you are finished:

- In which of the nine areas in the assessment do you find it hardest to act with the advisor mindset? Why?
- Where do you think, overall, you need to improve in order to consistently build deep, resilient client relationships?

This is an example of what the worksheet might look like when you fill it out:

The Expert Mindset		The Advisor Mindset
USUALLY:	Where would you place yourself on a continuum? ←————→	USUALLY:
Is for hire—says “Yes”	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	Has “selfless independence”—will say “No”
Tells and gives answers	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Asks good questions and listens

Do You Have the Expert or the Advisor Mindset?

The Expert Mindset		The Advisor Mindset
OFTEN:	Where would you place yourself on a continuum? 	OFTEN:
1. Is for hire—says “Yes”		Has “selfless independence”—will say “No”
2. Tells and gives answers		Asks good questions and listens
3. Stays within their expertise		Is a deep generalist, combining expert depth with knowledge breadth
4. Is good at analysis		Is a big picture thinker--good at analysis <i>and</i> synthesis
5. Builds credibility		Builds personal <i>and</i> professional trust
6. Is reactive		Is a proactive agenda setter
7. Sells		Creates a buyer
8. Focuses on transactions		Focuses on relationships
9. Has a scarcity outlook*		Has an abundance outlook**

***Scarcity outlook:** Tends to focus on limitations, risks, and pitfalls. Typically draws from traditional solutions. Stays within perceived boundaries.

****Abundance outlook:** Sees possibilities, potential, growth, and new ways of doing things. Looks outside of traditional boundaries.