

EXPERT VS ADVISOR MINDSET

Do you have it?

Check the box towards the left, middle, or right to indicate which end of the spectrum you are currently at. That is, for each area, are you closer to the expert mindset or advisor mindset”?

The Expert Mindset	←————→	The Advisor Mindset
OFTEN:	Where would you place yourself?	OFTEN:
REACTIVE Comes in after the fact	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	PROACTIVE Systematically looking and asking
TRADITIONAL This is how we've always done it	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	INNOVATIVE Thinks how we can do it better
TELLS and gives answers	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CURIOUS Asks questions and listens
EXPERTISE / PRODUCT CENTRIC Solution based on own experience	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CLIENT CENTRIC Offerings based on client problems
SAYS YES	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	INDEPENDENCE Is willing to say “no” and have tough conversations
BUILDS CREDIBILITY ON EXPERTISE	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	BUILDS PERSONAL AND PROFESSIONAL TRUST
SELLS	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	CREATES A BUYER
TRANSACTIONAL Focuses on transactions	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	RELATIONSHIP BASED Focuses on relationships
SILO APPROACH to solving client problems	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	COLLABORATIVE APPROACH to solving client problems

Actions:

1. Which area most reflects the Advisor Mindset for you?
2. Pick one area that you would want to improve on first?
3. Write down 2 or 3 small things to do to start moving toward the Advisor Mindset.

Looking for more resources? Grab the FREE EBOOK 'Getting Your Advisory Roll Out Perfect First Time' here:
<http://blueprinthq.com.au/getting-your-advisory-roll-out-perfect/>

ASSESS YOUR LISTENING SKILLS

Do you ever...?"

Tick "Yes" or "No" for each of the statements then add up the ticks in each column.

DO YOU EVER...	Yes (1 point)	No (0 points)
1. Interrupt others during a conversation?		
2. Rush clients and staff when they come to you for advice or information?		
3. Think ahead when others are talking?		
4. Finish people's sentences for them?		
5. Multi-task when others are talking for example, check your email while you're talking on the phone?		
6. Start thinking about your response before the other person has finished making their point?		
7. Fake attention while others are talking?		
8. Base your client meetings around mostly what you're going to say, rather than asking questions?		
9. Forget the names of people you've just met?		
10. Look at your watch or a clock when others are talking?		
TOTAL POINTS		

How did you do?

0–3 points: You're a very good listener

4–6 points: Plenty of room for improvement

7–10 points: You've got your work cut out for you! But that's OK

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<http://blueprintHQ.com.au/launch-advisory-ebook/>