


## Application Exercise One

### Do You Have the Expert Mindset or the Advisor Mindset?

1. 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 the “advisor mindset”?

The Expert Mindset		The Advisor Mindset
<b>OFTEN:</b>	Where would you place yourself?	<b>OFTEN:</b>
Is for hire—says “Yes”		Has “selfless independence”—is willing to say “no”
Tells and gives answers		Asks good questions and listens
Is a specialist		Is a deep generalist, combining knowledge depth with breadth
Is good at analysis		Is a big picture thinker who is good at analysis and synthesis
Builds credibility		Builds personal and professional trust
Is reactive		Is a proactive agenda setter
Sells		Creates a buyer
Focuses on transactions		Focuses on relationships
Has a scarcity mindset		Has an abundance mindset

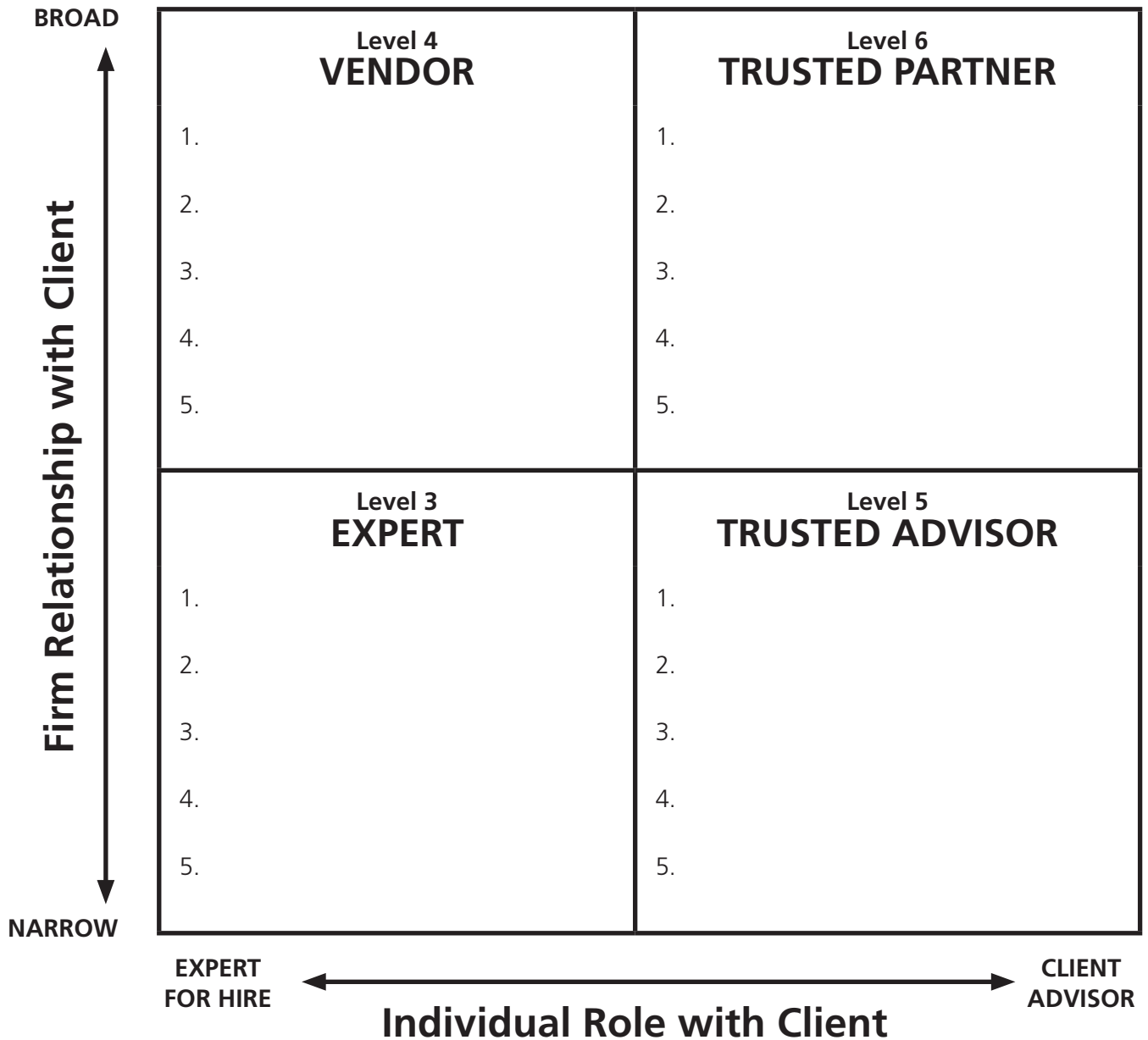
#### Questions to reflect upon:

1. In which areas do you most exemplify the advisor mindset?
2. In which areas do you behave more like an “expert-for-hire”? Why do you think that is?
3. Where would you most like to focus on changing and improving?

## Application Exercise Two

### Assess Your Client Portfolio

1. Assess your client portfolio by categorizing your current client relationships as either “Expert,” “Vendor,” “Trusted Advisor,” or “Trusted Partner.”
2. List all of your current clients in the appropriate quadrants.



#### Questions to reflect upon:

1. What strikes you as you look at where your clients fall into the different quadrants?
2. Which clients at levels 3 or 4 have the largest potential to grow and to develop into levels 5 and 6? What would it take to do that?
3. Are there some clients you should try to drop or de-emphasize?

*(Note: Level 1=Contact, Level 2=Acquaintance)*

## Use Agenda Setting Strategies in an Upcoming Client Meeting

You will generate ideas about how to make your next client meeting an Agenda Setting event. Your goal is to bring new perspectives and ideas to the meeting and clearly tie your operational conversations to one or more of your client's key priorities.

1. Think of an upcoming client meeting.
2. Use the client worksheet on the following page to gather your thoughts.
3. Take 5 minutes to brainstorm how you could give an “Agenda Setting” flavor or dimension to that meeting.
  - a. How can you elevate the discussion beyond a review of project execution or the status of your milestones?
  - b. How could you bring some new ideas or perspectives to the session?
  - c. How could you use it as an occasion to clarify the client's evolving priorities or needs and/or to clearly link your work to those priorities?
  - d. What “Agenda Setting” questions could you formulate and bring to your meeting?
4. Write down your ideas and action steps in the worksheet on the following page.

## Application Exercise

# Use Agenda Setting Strategies in an Upcoming Client Meeting

Name of my client:	Date of next meeting:
<p>Actions I can take to introduce Agenda Setting into this meeting to either more firmly connect the discussion to the client's key goals and/or to showcase new ideas and perspectives.</p> <p>Ask yourself:</p> <ul style="list-style-type: none"><li>• How can I elevate the discussion beyond a review of project execution or the status of my milestones?</li><li>• How could I bring some new ideas or perspectives to the session?</li><li>• How could I use it as an occasion to connect our work to the client's agenda of key priorities and/or to help refine them?</li><li>• What thought-provoking questions can I ask?</li></ul>	
Action 1:	
Action 2:	
Action 3:	
Action 4:	
Action 5:	

## Application Exercise One

### Accelerate Trust with a Prospective Client

Write down the name of a prospect—of the individual executive, not the company—with whom you are going to be meeting. Review the checklist, below, and identify the trust-acceleration strategies that you feel would be effective in this particular circumstance.

Name of prospect (individual):		
Trust Acceleration Strategies	Check if this is a strategy you would like to emphasize	Any specific next step?
1. Get a warm introduction or recommendation from someone the prospect trusts.		
2. Spend the time to pull together value-added insights, e.g.: Market information, competitive trends, best practices, an industry “point of view,” data on customer behavior and attitudes, etc.		
3. Conduct in-depth preparation: Research the company, the executive you’re meeting, industry trends, the history of the company, etc.		
4. Make an offer to invest: e.g. to explore an issue, do a diagnosis, etc.		
5. Build more face time: Create more opportunities to connect face-to-face.		
6. Obtain and use third-party endorsements: These can include testimonials, references, publications, and so on.		
7. Explicitly talk about your relationship focus and long-term orientation.		
8. If appropriate, say “no” to something: e.g. a request to do something you aren’t that good at or don’t believe is the right thing to do for the client.		
9. Get your prospect to speak or meet and discuss your work with a current client, who shares their problems.		
10. Boldly put unspoken issues/concerns on the table.		