

Find Your Advisory Style

Self-Assessment & Signature Question Card

For each scenario, circle the response closest to your real instinct — not the one you think you should pick. There's no wrong answer; this is a spectrum, and most people are a blend with one clear lean.

1. A client goes quiet after you deliver disappointing news. Your instinct is to:

- L Sit in the silence and let them speak first.
- T Explain what happened and why, using a simple analogy.
- C Name directly what you think they're feeling and ask what they want to do about it.

2. A client asks a question you don't have a confident answer to. You:

- L Ask what's really behind the question before answering.
- T Walk them through how you'd find the answer, step by step.
- C Tell them plainly you don't know yet, and commit to a date you will.

3. In a meeting, the client starts talking about something unrelated to the agenda. You:

- L Let them run with it — it's often where the real issue is.
- T Gently connect what they're saying back to something you can teach from.
- C Redirect firmly: "Let's come back to that — here's what matters today."

4. You notice a problem in a client's numbers that they haven't mentioned. You:

- L Ask an open question that lets them discover it themselves.
- T Prepare a simple visual to show them what you're seeing.
- C Name it directly in the next five minutes of the call.

5. A client pushes back on your fee. You:

- L Ask what's really driving the pushback before responding.
- T Walk them through the value delivered, point by point.
- C Hold the number and ask them directly what they think is fair.

6. At a networking event, you naturally:

- L Ask people about themselves and remember the details.
- T Explain what you do using a story or example.
- C Get straight to the point about how you could help.

7. When you disagree with a client's decision, you:

- L Ask questions that help them arrive at their own reconsideration.
- T Lay out the tradeoffs like a lesson, with pros and cons.
- C Tell them directly you think it's the wrong call, and why.

8. Your best client feedback tends to sound like:

- L "You really listen — I feel understood."
- T "You explain things so I actually get it."
- C "You tell me the truth even when it's hard to hear."

Tally

L — The Listener	T — The Teacher	C — The Challenger
Count: _____	Count: _____	Count: _____

Your highest count is your natural lean. A near-tie means you flex between two styles depending on the client — that's a strength, not a lack of clarity.

Signature Question Card

Fill this out and keep it somewhere you'll actually see it before client calls.

My dominant style: _____

The one move I'll deliberately borrow from another style this month:

My signature opening question — the one that's authentically mine:

One client I'll try it with, and when: _____