

ADVISOR PROFILETM

Playing to your Strong Suits as a Professional Business Advisor



YOUR **PROFILE** BACKGROUND

Before we start, read the background of how this profiling system was developed and how to get the most value from it.

Purpose of the Profile:

Anyone with a passion for business and for helping others to succeed can become a successful advisor. The purpose of this profiling system is therefore to assist you to identify the key strengths that you will rely on to launch, build and scale your business as a professional advisor. We also know that success is a team sport rather than an individual pursuit. How to build the right environment that allows us to perform at our best is each of our professional responsibility to nurture and grow as we make progress throughout our careers. We've all seen evidence of this in many corporate settings from people with similar skill sets that succeed in some environments, but stumble in others. This industry is no different where the peer group you form and the expertise you surround yourself with, will determine how far you can extend your ambitions.

The DISC Connection:

The Advisor Profile is a derivative of the DISC profiling system. The extensive history of DISC and the expertise of its many contributors who have created and developed this well known profiling system are the reason for using DISC as a base for the Advisor Profiling system. Each archetype in the Adviser Profile has been developed from observing 18 years of advisors with every type of DISC profile. To arrive at each Archetype has been to crystallise the aspect of the advisor's role that is the most natural fit where the unique talents of the advisor are revealed. These are the role-specific talents that drive the success of each individual advisor and ultimately are their highest observable talent that will be valued by their clients. They are the money-makers. We all have them, and once we can identify and nurture these talents, our impact and influence will produce extremely lucrative results for advisors and clients alike.

Finding out More:

What to do with your profile will be the next most obvious question once you have completed your Advisor Profile and debrief. It is likely you'll also have questions on particular aspects of your profile where the statements in the profile may lead you to want more details. For this reason we have further information available on all aspects of how to monetise your profile. To find out more about how to utilise your profile commercially, we suggest a Discovery Call with one of our team who will assist with your questions. We hope you enjoy the insights you'll gain from completing your profile and wish you every success in the steps you're taking to find the best use of your talents.

Thanks for your commitment to self development, your profile debrief is next...

YOUR PROFILE DEBRIEF

Now we want to look at your DISC Profile and identify the key features that are strong suits for you...

Identifier Quadrants:

From Page 2* write down the 1 (or 2 max) quadrants that are in the 60-100 range (Natural Style only)

*Of your DISC Profile

Identifier Reference Number:

You will need this number to convert your DISC profile to your Advisor Profile

D = 1	I = 3	S = 5	C = 7
DI = 2	IS = 4	SC = 6	CD = 8
ID = 2	SI = 4	CS = 6	DC = 8

What was my highest Quadrant:

On Page 5, write down those descriptions that apply to you from the TOP 6 on the list...

What was my lowest Quadrant:

On Page 5, write down those descriptions that apply to you from the BOTTOM 6 on the list...

Natural Style Pattern:

From Page 11, what's at least one (or more) key statement(s) that you know is **true for you**...

Additional Insights: Read the bullet points next to the bar chart that matches your highest and lowest quadrants from pages 7-10...

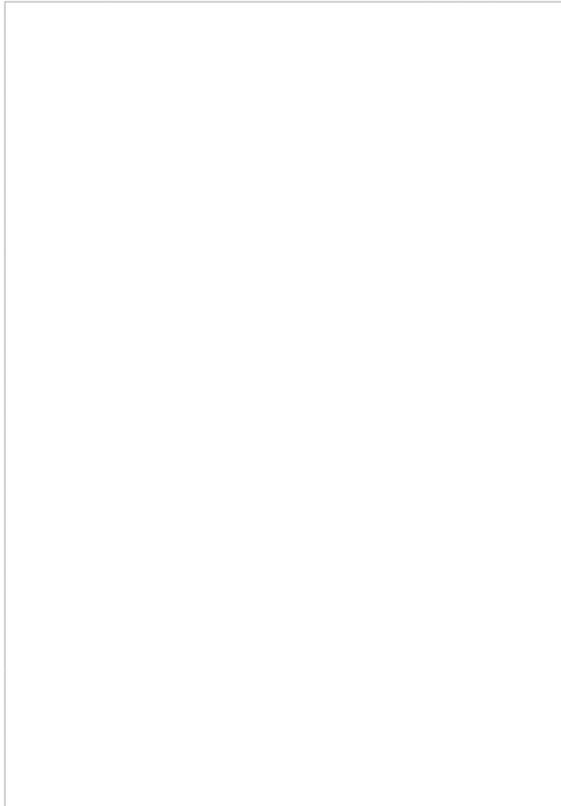
YOUR **STRENGTH** INSIGHTS

Have a look at the areas that you're naturally good at...

Strengths

Turn to Page 15...

What are the **1 or 2 statements** that you think describes your strengths best...



How do you believe this will help you best when you're working with Clients...



What activities from the list below will play to this strength...

- Keeping clients motivated
- Explaining strategy to clients
- Collaborating with clients
- Brainstorming with clients
- Holding clients accountable
- Retaining long term clients
- What else?

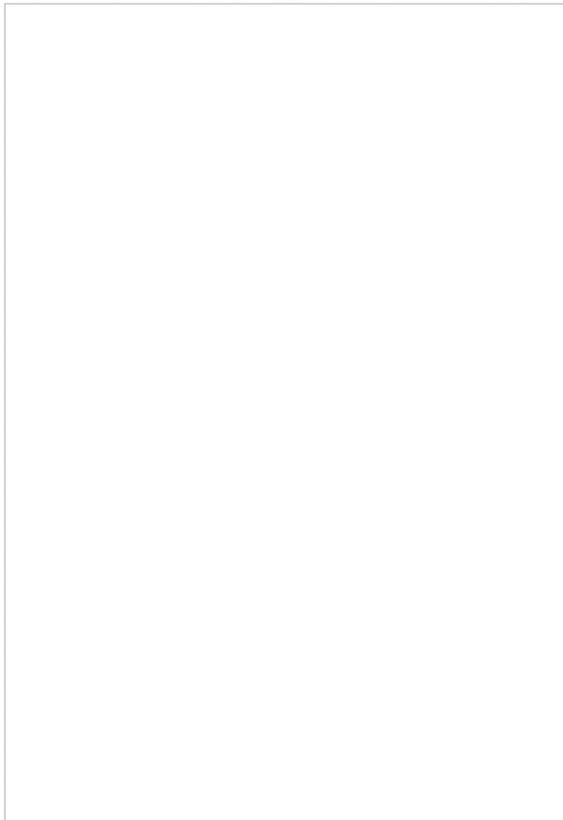
YOUR **IMPROVEMENT** INSIGHTS

The purpose of looking here is to see what effect they would have on both your performance and your motivation in your role as an advisor.

Areas to Address:

Have a look at Page 17...

What are 1 or 2 of the **statements** written that resonate with you?



What has been the effect of these with your current career performance to date?

From Page 14. choose 1-2 ideas that relate to how you stay motivated?



ANY **SHIFT** PATTERNS [Only if +/- 30 Points]

When assessing your profile it's important to address any instances where the Natural and Adaptive profiles are out of alignment. The nature of 30+ point differences is a perceived need to SIGNIFICANTLY modify behaviour and hence can be an indicator of stress, disempowerment and/or inauthentic behaviour... We should always be working towards alignment of internal and external where you can have the freedom to express your most authentic self. Please consider how the following statements may be influencing your current state. From your NATURAL Profile (DIS or C), a shift (either up or down) in your ADAPTIVE profile is assessed as a perceived need to be...



D Shift Up

...Is assessed as a perceived need to be...

More direct, assertive or confident

Why it's stressful with such a big shift...

Hard to maintain, might get "found out"

Shift Down

Less assertive and more compliant, esp. around Ds

Can lead to resentment



I Shift Up

More friendly/need to display more confidence

Sometimes it's not, but may need some alone time to power up

Shift Down

More formality and discipline, need to dial it back

Feeling trapped in a high duty role

S Shift Up

Needing to be more passive, take orders, keep peace

Being passive is difficult if you're being dominated

Shift Down

Needing to be more spontaneous, faster pace

You're risking yourself being noticed, getting it wrong

C Shift Up

To be more detailed, analytical or thorough

Can feel like if you get anything wrong you'll be in trouble

Shift Down

Needing to get things done regardless of quality

Being held accountable if it comes back to bite you

MAKING POSITIVE CHANGE

Your profile is not an excuse, it's a starting point to move towards behaviour that will serve you best as an advisor! So, what do you need to **Start** doing more of (that you think will make the biggest impact), **Stop** doing (that is hindering you) and **Continue** doing (in a more noticeable way... remember other's won't notice tweaks... GOTTA DIAL IT UP!). E.g. High D's and I's need to consciously stop themselves from being the center of attention. High S's and C's will need to speak up more with this skill so their listening is less passive and more active. (Ref: Page 17 of your DISC profile)

Examples:

D's

- Need for patience
- Dial up listening skills
- Focused on facts not emotions
- Low interest in people, high interest in task
- Very little care factor
- Inability to follow system
- Overconfident & underprepared
- Can't/won't change for fear of losing control
- Doesn't acknowledge or support others

I's

- Need to be liked
- Impaired ability to give or take constructive feedback
- Wants to be centre of attention
- Relies on being impressive
- Talks too much
- Listens for gaps so they can talk again
- Doesn't like silence
- Can't ask uncomfortable questions
- Doesn't push people
- Happy with expectations of others
- Under-prepares for conversations
- Feels rejection too easily
- Takes everything too personally

S's

- Inability to confront
- Low energy
- Can't ask for what they really want
- Let's people off the hook
- Doesn't push themselves
- Avoids conflict with self/others
- Feels overwhelmed easily
- Worries, frets & procrastinates
- Too "reasonable"
- Prefers to observe not participate

C's

- Rambles without thinking
- Focused on process over outcome
- Gets lost in details
- Overly critical & judgemental
- Waits for things to be perfect
- Constant feeling of "I don't know enough"
- Needs to be right
- Lets the system get in the way of the desired outcome
- Too mechanical not natural
- Needs to lighten up
- "Serious" disease

Stop | e.g. D's: STOP interrupting people while they are talking so I can get my point across!

Start | e.g. D's: Tuning in to listen how they're feeling about taking action as a result of the conversation...

Continue | e.g. D's: Determination, but consciously add another 20% of intensity

THE ADVISOR PROFILE

Based on your natural state, there will be a “style pattern” that identifies the type of advisor that matches your strong suits. Which are you?

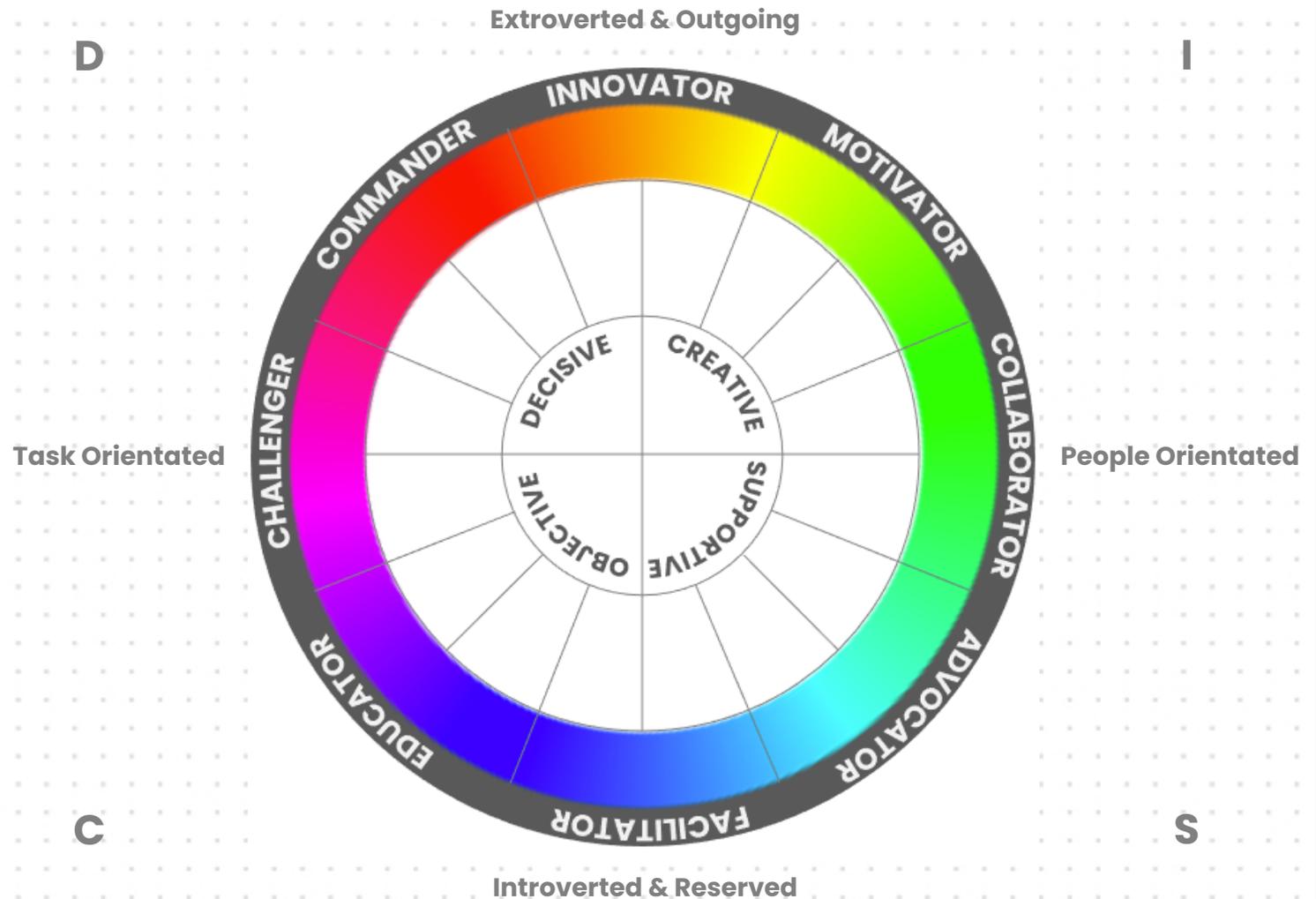
What was your ID Reference Number?

[from page 3 of this workbook]

1. Is a **Commander**
2. Is an **Innovator**
3. Is a **Motivator**
4. Is a **Collaborator**
5. Is an **Advocator**
6. Is a **Facilitator**
7. Is an **Educator**
8. Is a **Challenger**

My Advisor Profile is:

The 1 or 2 descriptors from the centre of the profile wheel that match my profile are:



YOUR PROFILE INSIGHTS

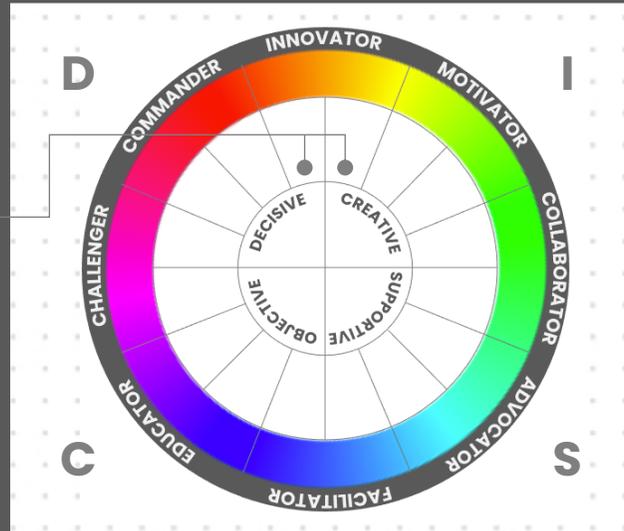


Each profile gives you insights under the following categories. Read over each section before you read your profile...

General Overview:

There are 8 styles of Advisor and each has their own key to unlocking your potential. The wheel shows you how this fits with the DISC profile that your Advisor Profile has been derived from. The wheel shows 2 segments for each Profile name. This can be useful for finding the profile that is “next closest” to yours. For example if you were a “DI” DISC type, then your primary profile is **Innovator** but you’ll tend to favour **Commander** more than **Motivator** as your D is higher than your I. If your DISC type was “ID” then you’ll likely favour **Motivator** more than **Commander**. If your DISC profile has a very balanced D and I, and they both scored over 80 on the DISC bar chart (from page 2 of your DISC report), then your profile is likely to have less influence from either side.

The numbering system from 1-8 generally has lower-numbered profiles favouring “Client Acquisition” over “Client Retention” (they are more extroverted profiles). Whereas the higher-numbered profiles are likely to favour retention & delivery of their programs over sales and marketing functions (as they tend to be more introverted).



Blind Spots:

- These will be areas to work on with the assistance of the “Side Suits” (as described below)

Judges Clients:

- Can be an “overuse” that you’ll need to keep in check when acquiring and retaining clients

Influences Clients:

- This is your primary super-power that defines your success as a professional Business Advisor

Strong Suits:

- Describes traits that your strengths play to when acquiring clients, retaining them long term & scaling your advisory business
- They are traits that are easy for you that other people notice & want for themselves (this is why clients will buy your skills!)

Side Suits:

- Review the profiles that are each side of your primary profile for attributes that will add to your advisory skillset

Acquires Clients:

Gives you key points to successfully acquire clients into premium programs

Retains Clients:

Gives you key points to retain long-term clients in high value continuity programs

Learn From:

- You will learn most from profiles that are opposite yours on the Profile wheel. They will have contrasting skills that will optimise your own.
- There will also be a profile that is most helpful for either commercialising or empowering your success (both vital!). This can be either left or right of your own.

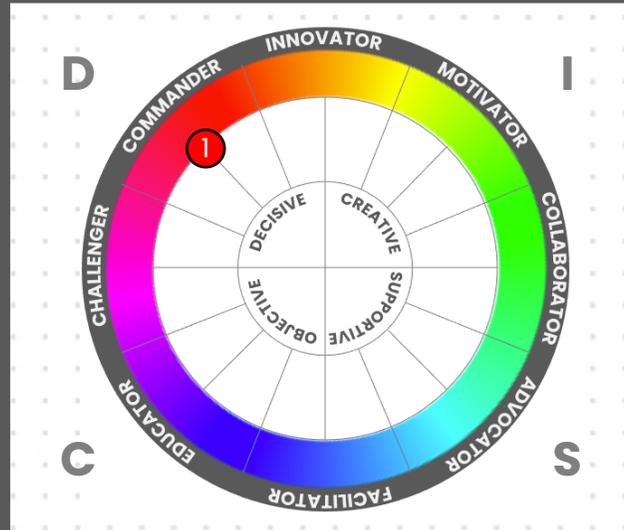
THE COMMANDER PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Commanders have an unshakable self-belief. They are high competitive individuals who thrive under pressure when fast decisions are needed. They are very direct and have an unflinching style that transfers confidence to those they come in contact with. They do everything fast and want to know what benchmarks are available so they can beat them. Commanders excel in sales and bring on clients very quickly. Their best opportunity for improving their performance lies in reaching out for help rather than being overly self-reliant. When they do this, the advice is often to slow down, listen and be patient. These are all things that are counter-intuitive to a Commander. With clients, they can often become overly focused on the business and forget or ignore being relatable and personal. They can tend to “burn” clients when this is not recognised. When Commanders tame their need to control everything, they become extremely effective advisors who will quickly look to build scale.



Blind Spots:

- Overly self-reliant (if I can't solve it, no one can)
- Being strongly opinionated rather than curious & interested
- A tendency to criticise & judge
- Moving too quickly without allowing clients time to process information

Judges Clients:

- By accomplishments & the intensity of their activity

Influences Clients:

- With bullet-proof confidence and tenacity

Strong Suits:

- Highly competitive and performance orientated towards results
- Able to take the lead and direct decision making
- Easily able to hold others to account
- Unrelenting commitment to progress

Side Suits:

- Review **Challenger** and **Innovator** profiles for attributes that will add to your advisory skillset

Learn From:

- **Advocators** who will demonstrate the effectiveness of empathy and coaching skills to empower their clients
- **Educators** who will assist you with planning, preparation and follow through

Acquires Clients:

Easily and with confidence to direct clients into their programs

Retains Clients:

By taking a personal interest in their clients beyond just their businesses

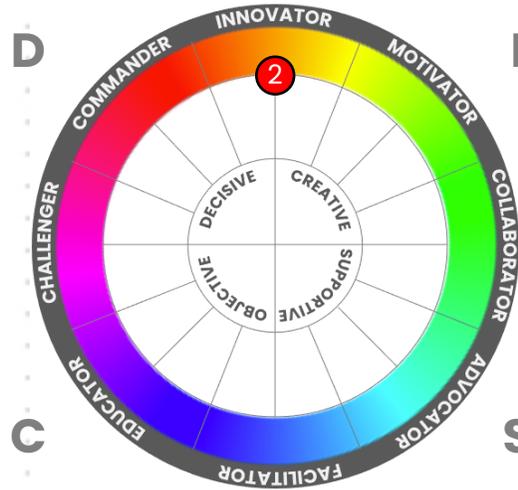
THE INNOVATOR PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Innovators love to create new possibilities with their clients. They are big picture advisors that inspire their client with a constant stream of high quality strategies and ideas. They are quick to action and their creative energy is often strongest under pressure. Following through on these ideas with the details and necessary project management skills for implementation is their biggest opportunity for improvement. They are outstanding when prospecting given their talent for uncovering insightful opportunities that compel clients to seek their help. Retention of clients can be an issue as they get bored easily, especially if clients are slow to respond to their ideas. This is overcome when an Innovator learns to balance their advisory programs with the right mix of personal development as well as business development.



Blind Spots:

- Giving clients space to process ideas
- Resisting the urge to change too quickly
- Listening for how empowered a client is feeling towards taking action
- Holding clients to account for progress
- Completion and follow through

Judges Clients:

- By their ability to implement effectively

Influences Clients:

- With compelling and original ideas

Strong Suits:

- Results Orientated and Driven
- Highly Creative Problem Solvers
- Initiates Activity & Generates Buy-In
- Able to articulate their ideas with fluency and passion

Side Suits:

- Review **Motivator** and **Commander** profiles for attributes that will add to your advisory skillset

Acquires Clients:

Easily and with confidence to direct clients into their programs

Retains Clients:

Easily providing a perfect blend of business & personal development

Learn From:

- **Facilitators** who will test your innovations and ideas for logical and practical integrity to known models and procedures
- **Challengers** who will assist you to commercialise your skills and talents

THE **MOTIVATOR** PROFILE

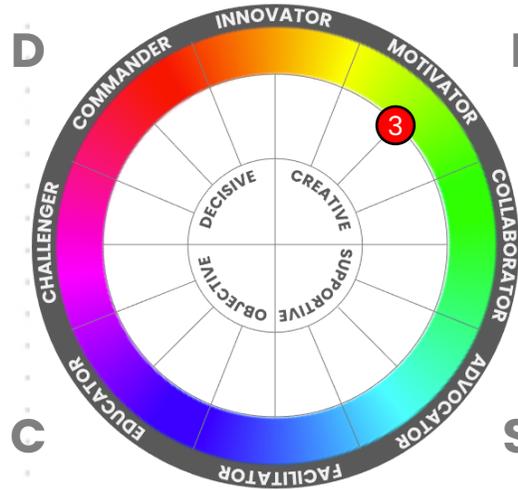


The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Motivators love to pitch and present ideas and are at their best on the front stage. They are inspiring to be with and have an energy that makes everyone feel excited about whatever is the focus of their discussion.

Motivators are very fluent speakers and can make things up on the spot very easily. This has a tendency for them to under-prepare for clients as they know they can outthink, outwit and outtalk anyone. Their natural charisma endears them to clients that makes up for the level of detail that is sometimes lacking. They retain their clients by having an endless supply of energy and ideas that always sounds exciting and enticing. As advisors, this can sometimes become a burden for them with the constant need to “perform”. This is overcome when they learn to nurture their clients and start to see their long term relationships as a journey rather than a destination.



Blind Spots:

- A need for the spotlight to be on them rather than on their clients
- Winging it and a tendency to be under-prepared (“I can talk my way out of it”)
- Not having a clear outcome in mind when taking the lead in discussions
- Becoming exhausted from feeling the constant need to perform

Judges Clients:

- By their enthusiasm & ability to get results

Influences Clients:

- With inter-personal energy & charisma

Strong Suits:

- Extremely resourceful and able to pivot
- Can think on their feet and communicate articulately
- Inspires others towards the big picture
- Ignites activity and creates momentum

Side Suits:

- Review **Innovator** and **Collaborator** profiles for attributes that will add to your advisory skillset

Learn From:

- **Educators** who will help you rely more on procedures rather than your personality
- **Commanders** who will assist you to convert your need for recognition and likeability into a sales and retention weapon

Acquires Clients:

Easily and with confidence to direct clients into their programs

Retains Clients:

By being a constant source of energy, optimism and focus toward results

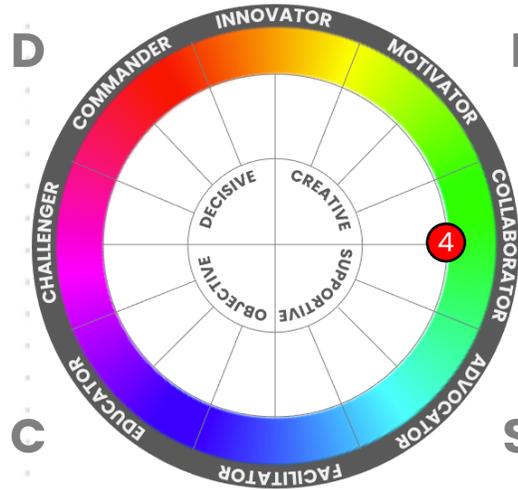
THE COLLABORATOR PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Collaborators are happiest when they are brain-storming with clients about a project driven by an innovative idea. They are extremely practical thinkers and have a strong sensibility towards how others will respond to their role in a project along with the tasks they are allocated. Collaborators are very gifted advisors given this dual ability to conceive ideas and develop details for implementation. They have a very calm and considered approach. Their “overuse” can be over communicating verbally that can sometimes go off topic. This can lead to a disregard for time and the ability of a client to maintain concentration for such long periods of discussion. This profile will typically have extremely strong networks and will easily maintain contact with high numbers of people. They will quickly acquire clients thanks to their ability to follow up and with their uncanny ability to build rapport. Retaining clients is their super-power as they quickly form strong and trusting relationships.



Blind Spots:

- Being direct and assertive when decisions from others are required
- May avoid conflict in favour of harmony
- Needs to express expectations of others without fear of conflict or judgement
- Maintaining a high sense of urgency
- Over-reliance on logic over emotion

Judges Clients:

- By their loyalty & dependability to implement

Influences Clients:

- With their instant rapport & perseverance

Strong Suits:

- Instantly build trust & rapport with anyone
- Able to be both creative and practical
- Communicates a sincere interest in other people
- High levels of endurance & follow through

Side Suits:

- Review **Motivator** and **Advocator** profiles for attributes that will add to your advisory skillset

Learn From:

- **Challengers** who will assist your skills in managing confrontation and accountability
- **Innovators** who will extend and develop your ideas into commercial outcomes

Acquires Clients:

Easily and with confidence to direct clients into their programs

Retains Clients:

Easily providing a perfect blend of business & personal development

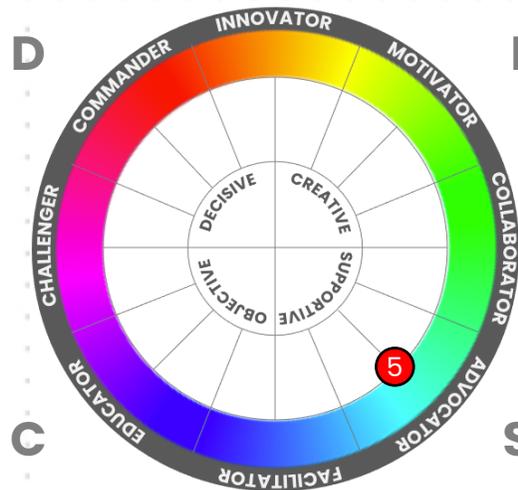
THE ADVOCATOR PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Advocators have an extremely high level of empathy that allows them to observe people with a unique level of insight. They are very strong situational leaders and can take command when needed and can quickly switch back to being a follower. Their interest in the level of success that other people can achieve is what drives them (as opposed to their own success which they see as somewhat secondary). They are highly supportive and nurturing and very sensitive to their clients' wellbeing. Confrontation is often a challenge for Advocators who would rather avoid conflict in favour of cooperation. This can lead to letting clients off the hook when accountability would be a more effective response. Without addressing this avoidance tendency, an Advocator can miss sales opportunities due to being too "nice". The breakthrough comes from replacing the idea of confrontation with that of empowerment through non-judgemental questioning techniques. This also translates to long term retention of clients who will value an Advocator's insights on their personal life as well as their business life.



Blind Spots:

- Being adaptable when confronted with curveballs
- Expressing your opinions rather than maintaining composure
- Pushing for decisions that are difficult for people to make
- Exhibiting high levels of empathy that can get in the way of results

Judges Clients:

- By their sincerity & contribution to the greater good

Influences Clients:

- By perceptive support & empowerment

Strong Suits:

- Supportive, encouraging and affirming
- Patient listeners with a genuine care-factor
- Perceptive and highly observant
- Systematic & well organised planners

Side Suits:

- Review **Collaborators** and **Facilitators** profiles for attributes that will add to your advisory skillset

Acquires Clients:

With the right blend of nurturing and non-judgemental accountability

Retains Clients:

Easily providing a perfect blend of business & personal development

Learn From:

- **Commanders** who will encourage your confidence around speaking your mind when confronted
- **Motivators** who will inspire you to articulate your thoughts and communicate with energy

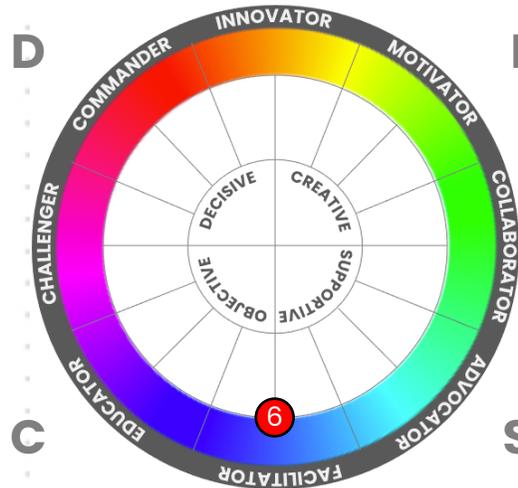
THE FACILITATOR PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Facilitators are naturally inquisitive. They have a deep reservoir of knowledge that they combine with their elevated interest in personal dynamics. Their ability to achieve practical outcomes from complex situations make them ideal for change management, crisis management and project management. Their interest in models, methods and systems make them an extremely valuable resource to their clients. They are equally effective with a team as they are with individual clients. Facilitators can sometimes find the sales and marketing functions as tedious given their extremely high skill levels with program delivery. The antidote for them is mastering referral marketing from clients who know their work is transformative. Facilitators will have long retention rates providing they see their engagement as a journey rather than a project.



Blind Spots:

- Being ok with self promotion and owning their authority
- Can be overly modest and avoids asking for what they want
- An urge to being theoretically correct instead of achieving a commercial result
- Overthinking everything

Judges Clients:

- By their level of organisation & system integrity

Influences Clients:

- With their clear thinking & consistency

Strong Suits:

- Logical and unflappable under pressure
- Extremely process & system orientated
- Well researched and technically minded
- Inclusive & comprehensive problem solver
- Fights hard for correctness & resolution

Side Suits:

- Review **Advocator** and **Educator** profiles for attributes that will add to your advisory skillset

Learn From:

- **Innovators** who will assist you with their creative and commercial acumen to leverage your skills and talents
- **Collaborators** who will encourage and support your growth and development as a professional advisor

Acquires Clients:

By following systems with a high level of discipline and tenacity

Retains Clients:

Easily providing a perfect blend of business & personal development

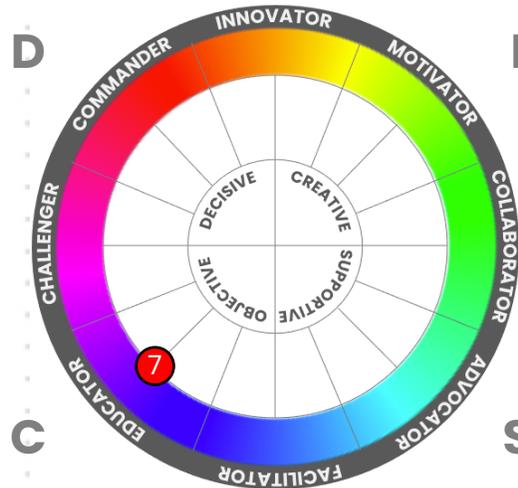
THE EDUCATOR PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Educators have an extremely high commitment to learning and discovery. They are consummate perfectionists and are standard-bearers for following procedures. Their knowledge is their source of power and their clients get the benefits of their broad understanding of how things work. They are system thinkers and are particular about detail and follow through. Educators are most comfortable in strategy and execution discussions with clients where they can be relied upon to bring facts and figures to back up their recommendations. Their retention of clients is based on maintaining a strong personal connection which is not always the priority of an Educator. They are at their best when they temper their logical orientation with emotional intelligence. When this happens, Educators master the sales and retention processes and become highly sort after advisors.



Blind Spots:

- Getting caught up in details for the sake of precision
- Tendency to making it perfect rather than making a start
- Being ok with learning from experience and mistakes
- Fault-finding that disempowers people

Judges Clients:

- By their rational decision making & follow through

Influences Clients:

- With dependable expertise and reliability

Strong Suits:

- Thorough and detailed with a sharp and analytical mind
- Always looking for a systematic solution
- Easily finds the root cause of an issue
- Unemotional & dogged when seeking results

Side Suits:

- Review **Facilitator** and **Challenger** profiles for attributes that will add to your advisory skillset

Learn From:

- **Motivators** who will inspire you to engage in team presentations and to communicate with energy
- **Commanders** who will help you with staying focused on commercial outcomes

Acquires Clients:

By following systems with a high level of discipline and tenacity

Retains Clients:

By providing a reliable blend of business advice with personal mentoring

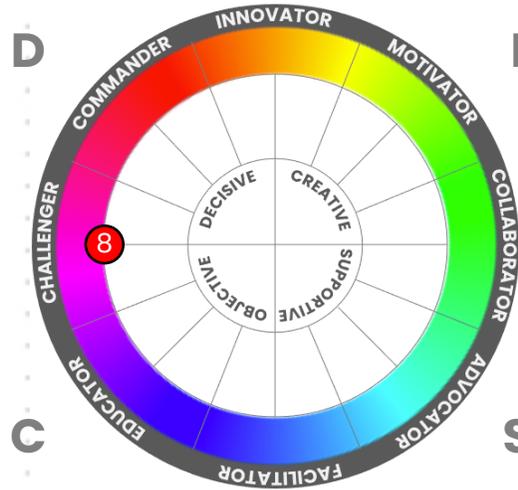
THE CHALLENGER PROFILE



The following analysis describes your natural behaviour and how to play to your strengths as a professional advisor.

General Overview:

Challengers make for very effective advisors and thrive in conflict situations. They are comfortable with confrontation and have no issue with calling out clients for sub-standard performance. Like their closely aligned Educator profiles, they have deep knowledge with practical advice that is highly outcome driven. Challengers are very self-disciplined and matter-of-fact. They can have a tendency to be perceived as overly critical and somewhat judgemental however this is easily forgiven by clients because Challengers are seldom wrong. When awareness of “bedside manner” is present, a Challenger will be able to balance their naturally argumentative style with empathy and sincerity. They are very strong in sales where clients see them as confident and highly competent practitioners. A Challenger’s goal-orientation make them ambitious and successful advisors.



Blind Spots:

- Being blunt with poor bedside manner
- Over-analysing systems for faults rather than uses
- Ignoring personal circumstances rather than bringing warmth and a care-factor
- Being too literal and direct

Judges Clients:

- By their level of complacency & drive for results

Influences Clients:

- With rational and irrefutable logic

Strong Suits:

- Pushes hard to resolve difficult problems
- Excellent decision makers under pressure
- Unemotional with confrontation & debate
- Driven & focused toward tangible results
- Highly effective in crisis management

Side Suits:

- Review **Commander** and **Educator** profiles for attributes that will add to your advisory skillset

Learn From:

- **Collaborators** who will encourage and support your growth and development
- **Innovators** who will assist you with their creative and commercial acumen to leverage your skills and talents

Acquires Clients:

By following systems with dogged determination & resolve

Retains Clients:

By being a constant source of confidence and strength

TO SUMMARISE

This debrief is designed to help you identify your Advisor Profile and help you discover how to monetise your skills with an opportunity to launch, build and scale a business in the Advisory space.

Defining Your Ideal Advisory Business:

At what level would you like to make an IMPACT with your skills? [tick & fill out as many options below that apply]

- A particular niche/specialist field that I have expertise in

Name my Niche:

- A local or regional area where I work or live

Name my Area:

- A national level of impact that I'd like to influence

Name the Country:

- Become an opinion leader in my field (global reach)

Opinion Leader In:

- Other

What LIFESTYLE would be ideal [working X days/week]?

days/wk

What INCOME would work for you [in the next 6 months]?

\$/month

What SCALE would you like to get your income to [in time]?

\$/annum

Top 3 Learnings From Your Advisor Profile:

1

2

3

A Discovery Call will provide you with a plan and further resources to assist you to achieve this... Schedule your Discovery Call here: www.trustedadvisor.co/discovery-call