

# THE EXPERT ADVISOR

## Course Agenda | Cadence Leadership + Communication

### I. BECOMING AN EXPERT ADVISOR – MINDSET + SKILL SET

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- An expert advisor helps enhance what a client can achieve.
- Acting as an advisor requires a shift in mindset + skill set.
- Mindset: Vision, Preparation, Authenticity and Accessibility.
- Skill Set: Clarity of Thought and Expression.
- Workshop: In small groups, participants will practice the above skills.

### II. CLARITY OF THOUGHT – DEEPENING RELATIONSHIPS

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- From utility to ability: Adopting an advisor mindset.
- Understanding how to build trust and deepen relationships.
- Accessing the client perspective: Who they are and what matters to them
- Developing a vision: Pre-meeting and post-meeting discussions.
- Workshop: Discussing current opportunities to deepen relationships.

### III. CLARITY OF EXPRESSION – LISTENING

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- Leading through listening: Physical, mental and emotional.
- Taking notes that deepen understanding and drive post-meeting strategy.
- Encouraging our audience: Prompting, directing and acknowledging
- Demonstrating understanding: Reflecting, paraphrasing and summary.
- Workshop: In small groups, participants will practice the above skills.

### IV. CLARITY OF EXPRESSION – QUESTIONING

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- Expanding the realm of the possible: Uncovering the real opportunity.
- Using standard and client-specific questions to lead the discussion.
- Using the question funnel to focus the discussion
- Using appreciative inquiry to understand and define expectations.
- Workshop: In small groups, participants will practice the above skills.

### V. CLARITY OF EXPRESSION – ADVISING

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- Communicating in a style that encourages receptiveness.
- Be the advisor: providing your audience with guidance and solutions.
- Inviting the audience to partner on a deeper level.
- Workshop: In small groups, participants will practice the above skills

### VI. CLOSING THE SESSION

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- Building your cadence - a daily effort.

