

**Realign
your mindset,
structure and
culture to make
advisory work.**

Closing the Gaps Worksheet

Every firm wants advisory to work, but even the best-intentioned teams get stuck. Not because you lack skill, but because gaps form between what you know, what you do, and what you believe.

These gaps show up in three areas: Mindset, Structure and Culture.

This worksheet helps you reconnect them, so advisory becomes consistent, scalable and part of who you are.

Step #1 Awareness

Where are you stuck?

Start by reflecting on where your firm might be out of alignment.
Answer honestly! This isn't about perfection, it's about progress.



Mindset

What keeps us in the compliance comfort zone?

Where are we still reporting instead of advising?

When do we default to giving answers instead of asking questions?

What holds us back from starting strategic conversations with confidence?

Structure

Where are we relying on one person's brilliance to drive advisory?

What tools or processes feel too reactive or manual?

What advice are we currently giving away for free?

How often are we leading the conversation versus responding to it?

Culture

How would our team describe what advisory means here?

What skills are missing that would help our team lead better conversations?

Who else (beyond partners) could own advisory outcomes in our firm?

What would it take to make advisory part of who we are, not just what we do?

Look at your answer previously. Now ask: where's the biggest disconnect between intention and reality?

Reflection prompts

What parts of our mindset, structure or culture feel out of sync?

Where do we say we do advisory, but **don't show it**?

What would it look like if all three worked together?

Write your thoughts

Step #3 Action

What will you realign first?

You don't need to fix everything, just start with one meaningful shift.

FOCUS AREA (MINDSET / STRUCTURE / CULTURE)	WHAT'S HAPPENING NOW	WHAT WE WANT INSTEAD	FIRST SMALL ACTION WE'LL TAKE	WHO WILL LEAD IT	WHEN WE'LL REVIEW

THANK YOU

This game-changer worksheet is part of our Advisory Advantage series. If you're ready to turn awareness into momentum, explore our next training session or access the full toolkit of frameworks and templates that help firms make advisory scalable and sustainable.