

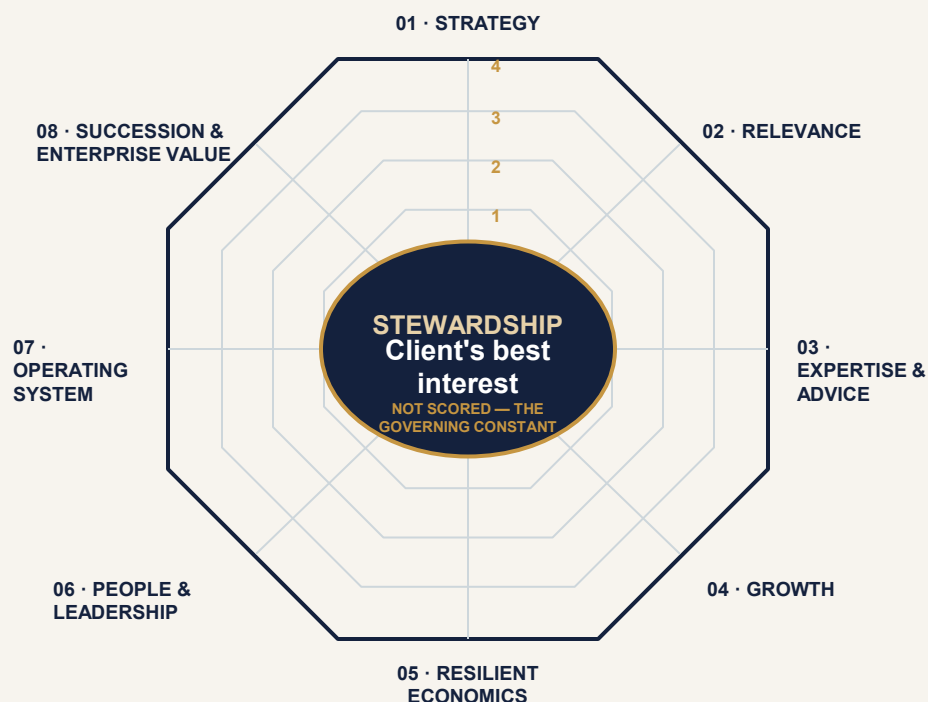
The Be the One Advisor Enterprise Diagnostic

Eight PROGRESS disciplines. One governing question. One 90-day move.

**IF CLIENTS CHOSE AGAIN TODAY,
WOULD YOU STILL BE THE ONE?**

SCORE WHAT THE EVIDENCE SUPPORTS

1 DEPENDENT	2 DEFINED	3 DISCIPLINED	4 ADAPTIVE
Reactive + person-led	Defined + uneven	Consistent + measured	Proactive + scalable



1. Score each axis from evidence; connect the points.
2. Name the result, practice, or decision behind each score.
3. Do not average. Identify the two lowest supported scores; use the shape to choose the highest-consequence gap.

01 · STRATEGY 1 2 3 4

Have we chosen the few moves that matter most next—and aligned the advisory enterprise to execute them?

Evidence: strategic priorities · capabilities · execution ownership

Finding: _____

03 · EXPERTISE & ADVICE 1 2 3 4

When client needs exceed our expertise, can we bring the right experts into the room at the right times—and keep accountability clear?

Evidence: specialist engagement · case ownership · implementation

Finding: _____

05 · RESILIENT ECONOMICS 1 2 3 4

Can our economics fund what clients will need next—and strengthen the advisory enterprise through uncertainty?

Evidence: operating margin · revenue per professional · reinvestment

Finding: _____

07 · OPERATING SYSTEM 1 2 3 4

Can the advisory enterprise deliver the same standard consistently—without relying on memory or heroics?

Evidence: workflow adherence · service consistency · advisor capacity

Finding: _____

02 · RELEVANCE 1 2 3 4

Are we becoming more valuable as clients' lives, families, and choices evolve?

Evidence: client retention · relationship depth · next-gen engagement

Finding: _____

04 · GROWTH 1 2 3 4

Does growth reflect value clients recognize—and expand our capacity to create more of it?

Evidence: organic growth · ideal-client gains · revenue growth

Finding: _____

06 · PEOPLE & LEADERSHIP 1 2 3 4

Are we building capability around the client—or merely adding capacity around the founder?

Evidence: role clarity · leadership depth · staff retention

Finding: _____

08 · SUCCESSION & ENTERPRISE VALUE 1 2 3 4

Could another capable leader sustain the client promise—and preserve the value of what has been built?

Evidence: succession plan · successor readiness · transferability

Finding: _____

CHOOSE THE HIGHEST-CONSEQUENCE GAP. COMMIT ONE 90-DAY MOVE.

Priority discipline _____ One decision we will make _____

Evidence of progress _____ Owner / review date _____