

2020 Advisory Conference

October 27-29

Converging knowledge and behaviors to deepen client relationships

First-Choice Advisor “5C’s” Series: Collaborative and Critical Thinkers

Critical Thinkers

NOTES:



Ask insightful “Why” questions.

Generate compelling new ideas.

Don’t take things at face value...inclined to critique or challenge the validity of new information.

Vigorously tackle vague or ambiguous problems...adept at making decisions under uncertainty.

Everyday
Thinker

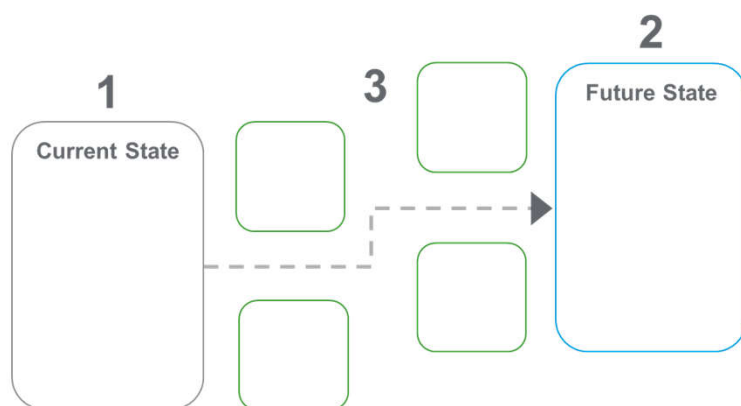


Have a high degree of situational awareness.

Open to diverse thinking and opinions...understand personal biases and can set them aside.

Future focused

Critical
Thinker



NOTES:

1 What is currently going well/not well for the organization?

2 What does success look like?

3 What needs to happen in order to close this gap?



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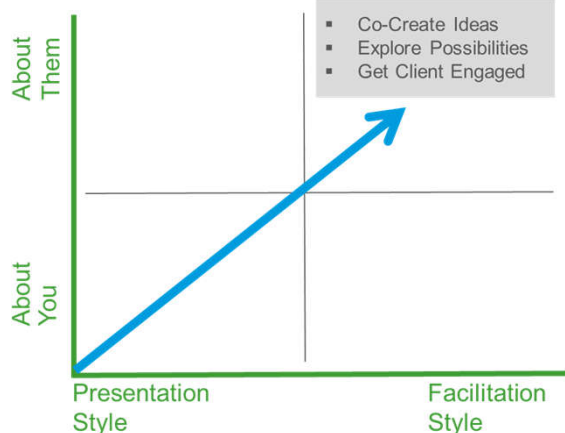
NOTES:

Collaborative

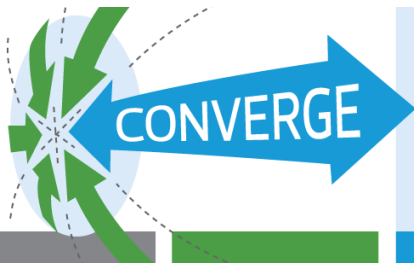
NOTES:



What's your style?



NOTES:



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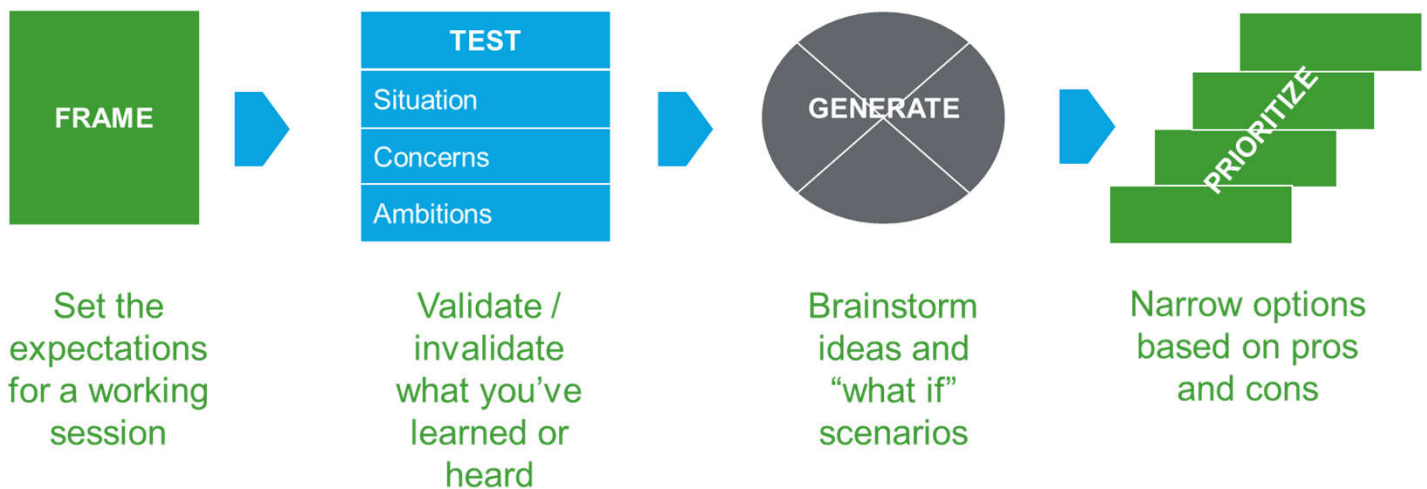
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Collaboration Barriers

What are common **barriers** to collaboration you face?

How can you **minimize** them?

Key components of a facilitated session



NOTES:



Application Challenge

On-Your-Own Assignment:

- **LEAD THE WAY** – Be intentional to guide your stakeholders through collaborative experiences.