



CHRISTOPHER SALEM

Become a Trusted Advisor in Your Practice



Workbook

Christophersalem.com 2020 all rights reserved

Trusted Advisor



What is a Trusted Advisor?

What does that mean to you in your practice and patients?

How can being a Trusted Advisor help position your practice to the next level?

Core Values



Why are core values essential to the foundation of a trusted advisor?

What are values represent you and how is this aligned in some way to your practice, staff, and patients?

CORE VALUES EXERCISE

Values Leadership Exercise

Directions for doing the exercise are as follows:

1. Start by crossing off the items that are not important to you.
2. Then, go through the list again, circling as many of the items that are very important to you.
3. The remainder of the list items will essentially be the things that are important but not very important.
4. Next, review the very important items. Consider whether there is a value missing that matters a lot to you and has not been listed—add that one in. From this group, select the five things that are most important to you.

Then, rank these five most important values, with number one being your most important value.

Achievement	Advancement	Adventure	Autonomy
Arts	Belonging	Beauty	Challenge
Change	Communications	Community	Competence
Cooperation	Collaboration	Country	Creativity
Curiosity	Decisiveness	Democracy	Diversity
Environmental Responsibility	Effectiveness	Efficiency	Excellence
Excitement	Expertise	Fairness	Fame
Family	Financial Gain	Freedom	Friendship
Fun	Health	Helping others	Helping society

Honesty	Humor	Independence	Influencing
Innovation	Harmony	Integrity	Intellectualism
Involvement	Knowledge	Leadership	Learning
Leisure	Location	Love	Loyalty
Mastery	Meaningful work	Merit	Nature
Openness	Order	Personal expression	Pleasure
Power	Prestige	Privacy	Productivity
Quality	Recognition	Relationships	Religion
Reputation	Respect	Responsibility	Security
Self-awareness	Self-respect	Self-realization	Serenity
Sophistication	Spirituality	Stability	Status
Structure	Teamwork	Truth	Variety
Wealth	Wisdom	Work/Life Balance	

Choose 5 Core Values

Examples:

- Happiness
- Meaningful Work
- Integrity
- Stability
- Trustworthy

Share Core Values with Partners, Staff and how this relates to your Patients

Do your values relate to others in some way or not?

Connect Each Other's Values to Your Practice

Leader determines the frequency to check in with team. (Ex. Weekly, Monthly, Quarterly)

- Are these values still serving you?

- How is work supporting or detracting from your values?

Find Ways to Support their Values from Work

What ways can you support your staff better?

How does bringing the staff's values together serve your patients better?

Other Questions to Define Your Foundation to Leadership

1. Are your values demonstrated in your day-to-day behavior?

2. Are you being true to your values? If not, consider the ways you can align what you truly value with how you lead your staff.

Characterstics of Trusted Advisors



- Be the example
- Ability to listen and understand
- Create an experience
- Adaptability
- Honest & ethical
- Focus on Long Term Relationships

develop powerful solutions

What characteristics represent you and your practice?

How can you apply characterstics currently not present to your practice

Attributes of Trusted Advisors



What do attributes currently represent you?

What is working and not working?

How can you be of more value making modifications or adjustments as a trusted advisor?

Do you focus on short or long-term goals?

What are you short term and long term goals?

What are your current challenges?

What can you do different?

The 5 “I”s of Influence Mastery



- Insight
- Initiative
- Influence
- Impact
- Integrity

Why is establishing yourself as a Trusted Advisor or Thought Leader important to your patients or audience?

How can you implement the 5 “I”s as a Trusted Advisor or Master Influencer?

Build your Reach and Influence



- Video
- Blogs
- Radio - Podcasts
- TV
- Speaking

What content platforms work best for you?

Which ones align with your strengths and weaknesses?

What combination works to your advantage based on your strengths?

What is the frequency of content you leverage with your patients or audience (daily, weekly, monthly, and quarterly)?

How can you do it better to grow your level of influence and build your sphere of influence with other experts both direct and indirect?

Roadmap to Growth



- Company Mission & Value Statement
- Specific Objectives & Goals
- Assess your values & principles
- SWOT
- Define Core Strategies
- Be Proactive & Review Often

What is your mission and vision statement for the practice?

Do you have value statement for your practice?

Why is having a value statement important for your practice in terms of influence, marketing, and brand image?

How do you assess your core values for your practice? (**See page3 for Core Values Exercise and the Value Statement Exercise on next page of this workbook**)

Why is having a SWOT Analysis important? Where do I apply it to scale my practice?

(Strengths, Weaknesses, Opportunities, Threats)

Why is having a SWOT Analysis important? Where do I apply it to scale my practice?

(Strengths, Weaknesses, Opportunities, Threats)

Why is defining your core strategies important to your current business plan and branding/influence strategy? Where do I apply it to scale my practice?

Why is defining your core strategies important to your current business plan and branding/influence strategy? Where do I apply it to scale my practice?

Why is it important to be proactive and review often to grow my practice as a trusted advisor?

How to Create Your Value Statement



Developing your Value Proposition

Step 1: Determine your Value

- How do you describe who you are and what your practice represents to others?
- How do they know you can help them solve their challenge?
- Do they understand how you can bring value?

Brief description of your company: e.g. We are a cardiology practice.....

Who are your core target types of patients?

How do you assist them? What requirements and challenges do you target?

What is your value to helping them solve their challenge or fulfill their requirement?

What products or services are you offering?

Can you back up your claim to helping them solve their challenge?

What makes you compelling?

Conduct Patient Surveys

What compelled you to work with our practice?

2. What made us compelling to you?

3. What benefits did you receive from us that helped your business?

4. How would you describe our service or product to others?

Step 2: Emotional Intelligence

What are the topics that evoke emotion and commitment?

Step 3: Components to Your Value Proposition

Target Audience: Who are your ideal patients or customers?

Target Requirements: How do you help them help themselves? What requirements do you address?

Value to Addressing their Requirements: What value do your clients receive from working with you?

Your Specific Offer: What are your core services specific to their requirements?

Proof of Concept: What is the proof you validate and back up?

Compelling: What makes you authentic and compelling?

Step 4: Avoid Catchy Marketing Phrases and Words

Review the work you did on the previous pages and remove any marketing speak you see. Here's a list of common terms and phrases to avoid.

- Unique
- Efficient
- Effective solutions
- 125 offices around the globe
- Unique blend of people, processes and technology
- Enabling peak performance
- World-class
- Client focused

Step 5: Write Your Value Proposition

Example:

We work with some of the worlds' best known companies **to help them** (target requirement) protect their brands. Using **our experience in** (specific offer) intellectual property law, we help companies like Nike and even organizations like the NBA protect the value of their brands. We offer a wide range of services, but **just last week we helped** (proof of concept) a client protect their newest music releases from counterfeiting in a developing country because we had the contacts on the ground to make sure their products were protected. That one bit of help will **safeguard millions of dollars in revenue** (value to solving their requirement) for them that would otherwise have gone to unauthorized vendors and costly law suits in a foreign country.

Step 6: Review, Revise, Repeat

- Do you explicitly say who your target audience is?
- Does your statement align on your customer's requirements?
- Does your statement exemplify value and address their challenge?
- Does your statement demonstrate that you understand how to help them solve their problem?
- Do you create desire and a sense of commitment for your company?

Now is the time to take your practice to the next level as a thought leader and influencer being a trusted advisor. Become more than just what you do with your patients. Become part of their journey to become more through your guidance of why you do what you do for them.

Congratulations on taking the steps to become a trusted advisor in your practice



About Chris Salem

Christopher Salem is an Executive Coach, Corporate Trainer, Business Advisor, and Professional Speaker working with companies to create an interdependent work environment and thriving culture through a growth mindset foundation, effective communication, transparent leadership, and higher engagement. He also mentors C-Suite, business leaders, entrepreneurs, and sales professionals to build and protect their brands by raising their level of influence as trusted advisors to maximize their results. His book *Master Your Inner Critic / Resolve the Root Cause – Create Prosperity* went international best seller in 2016. He also co-authored the recent edition to "Mastering the Art of Success" with Jack Canfield. His weekly radio show *Sustainable Success* is part of the Voice America Influencers Channel. Chris is also an accomplished business & emotional intelligence strategist, award-winning author®, certified mindset expert, radio show host & media personality, and wellness advocate. He works with organizations such as JP Morgan – Chase, Ralph Lauren, GE Research, UTC - Pratt & Whitney, Raytheon, Microchip Technologies, Anthem, US Census Bureau, United Healthcare, Laticrete Corporation, Hubbell Corporation, Conning & Company, Foxwoods Casino, US Senate, and NYPD Forensics Department including universities such as University of Hartford, Westchester Community College, Bay Path University, Worcester State University, and spoke on overcoming limited beliefs for peak performance at Harvard University's Faculty Club.

Christopher R. Salem

CRS Group Holdings, LLC

210A Southern Boulevard

Danbury, CT 06810

203-733-8469

chris@christophersalem.com

