

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Headed West ...the beginning

Dear Friends,

At the heart of true customer-centric service (the first shift we make as advisors) is the desire to listen. It's not about having all of the answers, rather, it's about understanding the power of asking different questions. By asking them, you make the real expert, *your client*, feel smarter.

I really didn't have a choice when I first landed in the middle of Napa Valley wine country in 2007.

Go West, Y'all Go West - 2004

I had arrived 3 years earlier from Atlanta, not as you might guess, in a pickup truck, but in a [three-door red Saturn](#) stuffed full of clothes for myself and my 9th grade daughter, a million pairs of moccasins we had picked up along our drive, and our basset hound. (The moving truck and the rest of our family*

would follow later). It was November in the South when we began our trek to California. I would take on a new role for my software employer at the time. I lasted almost three years.

Does it have legs? What's terroir? Barn Yard Aroma?

So, three years later, I find myself, a Franzia-In-A-Box drinkin' southerner, in a new role ready to start delivering advisory services to fancy, expensive, often unpronounceable wine brands I couldn't afford to buy. That's when I discovered that my lack of knowledge was actually a gift. And this southern accent of mine gave me permission to be who I was - my clients had no expectations that I would know anything about wine or the business of wine. But that didn't mean I didn't know numbers, or business, or process, or technology, or how to communicate concepts in a way that stuck. In fact, the software job that moved me out to California in the first place was in product marketing - it's all about communicating technical concepts to business folks. You have knowledge you can leverage too. Across industries.

Luckily, I had already been *exposed to* and *certified in* an [advisory methodology](#) that armed me with the confidence to use those questions and my existing skills to work in a new and frightening industry. My first client meeting was pretty scary, but the second one wasn't.

Certifiable

I did eventually become an expert in my own right - and I still hold that title today. I am a **certifiable expert at asking dumb questions**. I am not afraid to be that person. As a result, I get to learn something new every single day and often. The questions I ask, allow someone else to gain insight into a tool or process or metric that wasn't clear to them before. AHA!

Ask different questions. Go beyond looking at financial statements and understand what's really going on with that client of yours. Don't be afraid to ask. And then ask some more. Get a clear and deep understanding. Your clients need your help.

Keep those ears flappin y'all,

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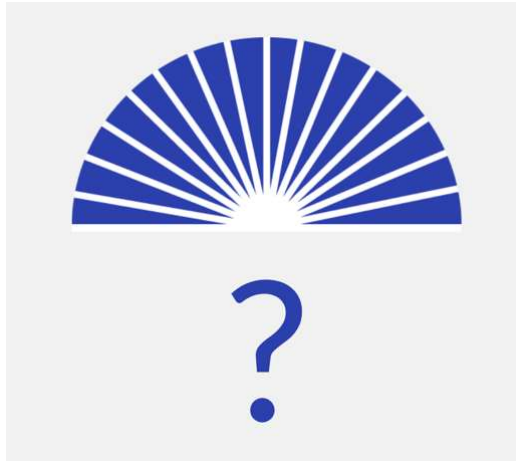


Group Training - First class including DISC debrief starts 2/22/23

Bookkeepers and Non-Tax Related Accounting Professionals, this [Cohort](#) is for you!
What's different about this Cohort than my normal offering?

- **Time commitment is less:** I am coaching you bi-weekly through Levels 1-3
- **More affordable:** Since I am only coaching you through Level 3, you have the ability to finish the remainder of the training at your own pace while getting the benefit of personalized coaching sessions.

So, what is holding you back? Is it time, investment, lack of confidence? I encourage you to [Email Me](#) let's figure it out together.



Question of the month:

Whenever you face a big decision, ask yourself this question. Are you running *from* or running *to*? If you are drawn to a new opportunity out of fear, you are running from. If you are facing the new opportunity with excitement (which often feels a lot like fear) then you are running to.

Check in with yourself to get guidance about that decision.



Upcoming speaking events:

2/22 Online: [Mountain Magic Cohort - Session#1](#)

2/22 Online: [Thriving & Surviving - Level 5 Alumni Meet Up](#)

3/15 Online: LinkedIn LIVE - Advisory in Real Life



Grits?

When I first moved to California, via the trek mentioned above, I couldn't find grits anywhere. The guy in [Whole Foods](#) just looked at me blankly when I asked him where to find them. I began to wonder if I could survive this foreign land. And then, as I was wandering around the store, I found an entire bin, labelled "Polenta". That's when my journey of re-education officially began. After finding "polenta under glass" on a menu at a fancy restaurant, I even launched this website polentaunderglass.com

What is your muse?? Or your mush?

Making an Impact

If you missed this month's LinkedIn Live then you can [watch it again here!](#)

In this episode of Advisory in Real Life, I interview **Leslie Quesada** who is now a [Level 5 Certified Advisor](#). In this interview she shares her thoughts about advisory and how it applies inside her firm. Leslie and four others from her firm were part of a private firm advisory training cohort I held last year. They graduated earlier this

month and are ready to make an impact! 🎉 Congrats to 🎉

Marie G, Michelle L, Edward M, Allene M, & Leslie Q.

If you're a growing firm interested in specialized group training for members of your team, [contact me](#).

Moccasins were **the thing in Atlanta when we left and they were on sale at little out of the way shops at every stop - they came in every color for my daughter. When we arrived in Pleasanton, CA moccasins were so NOT cool. So much for that bonding moment.*



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