

**lisnic.**

# Business Expert Guide

A guided framework to manage your Lisnic sessions.

Version 1.0 – Lisnic

## CORE VALUES

# Lisnic Experts ASPIRE

Our Experts all believe in the same values and ASPIRE to deliver the very best for their Advisees.

What does it mean to ASPIRE?

### Authenticity earns trust

Delivering value is absolutely essential. Lisnic Experts form long term relationships by earning trust and respect.

### Shut up & listen

It's great that you can explain cash flow, but is that what your Advisee asked?

### Plan ahead

Lisnic Experts are always respectful. Be early and do some prepping for your Advisee. Read over their request, remember their name and look at their experience.

### Intellectual property

Nothing leaves Lisnic. By entering your session you agree that all information and material has been deemed private unless expressed by the disclosing party in writing.

### Request feedback

We're always here to help, but the easiest way to ensure that you're delivering value is to ask. Be open to improving and always ask your Advisee for feedback at the end of a session.

### Empathy is everything

Be a good human being and focus on how you can help your Advisee.

# Pre-session checklist

Use the following checklist to ensure you are well-prepared for each and every session with your Advisee:

- I have read over the request post
- I have added the session to my calendar
- I am aware of the timezone difference (if any)
- I know the name of my Advisee and their business or background
- I have asked my Advisee via the chat to think about what they want to gain from our session
- I have asked my Advisee via the chat to send through any specific questions they want answered

# Session 1: Getting to know your Advisee

## Session objectives

- 1 To determine if this is a one-off session or a long-term relationship
- 2 To gain an understanding of your Advisee's business / current project or challenge
- 3 To sketch a timeline of goals that include high and low level tasks to complete and review in future sessions

Direct your Advisee to the ["Effective Meeting Notes Template"](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

*"Is this your first time asking for business advice? If not, what did/didn't work in the past?"*

*"What can I do to ensure you get the most out of this session?"*

*"What has been your greatest success/challenge so far with this business/current project?"*

*"Let's talk about where you would like to be six months down the track"*

It would be great to conclude this session by setting your Advisee a high and low level task to review in future sessions.

## High level task examples

- **Startup founders:**  
Map out and implement a strategic plan to scale the business
- **Working professionals:**  
Implement a five-step plan to stay ahead of upcoming advancements in the field (Lisnic Resource ["Staying relevant and irreplaceable"](#))
- **Business owners:**  
Implement and roll-out a new project (Lisnic Resource ["Project action plan"](#))

## Low level task examples

- **Startup founders:**  
Ask your Advisee to estimate funding requirements (Lisnic Resource ["Requirements Calculator"](#))
- **Working professionals:**  
Ask your Advisee to analyse how effectively they use their time at work (Lisnic Resource ["Time Management Tools"](#))
- **Business owners:**  
Ask your Advisee to re-examine the competitive landscape their business operates in (Lisnic Resource ["Competitive Analysis Matrix"](#))

## What do I need to prepare for the next session?

# Session 2: Strengthen trust and respect

## Session objectives

- 1 To review your Advisee's progress on their low level tasks
- 2 To check your Advisee's progress on their high level tasks
- 3 To refine and adjust your Advisee's goal timeline

Direct your Advisee to the ["Effective Meeting Notes Template"](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

*"How are you travelling with your high level task?"*

*"Did you finish your low level task, if yes, congratulations! Walk me through your findings"*

*"Did you finish your low level task, if no, why? Let's walk through your setbacks and reset"*

*"Let's set another low level task to focus on for the next 30 days"*

It would be great to conclude this session by setting 'a timeline' for your Advisee's future high and low level tasks

## Some resources that may help with this session

- ↓ [Lisnic's Problem Solving Template](#)  
This document walks you through how to frame a problem, determine the root cause, develop a solution and set a timeline
- ↓ [Lisnic's Structuring Ideas](#)  
This document breaks down an idea using the MECE technique: Mutually Exclusive, Collectively Exhaustive

## What do I need to prepare for the next session?

# Session 3: Building momentum

## Session objectives

- 1 To review your Advisee's progress on their low level tasks
- 2 To check your Advisee's progress on their high level tasks
- 3 To refine and adjust your Advisee's goal timeline

Direct your Advisee to the ["Effective Meeting Notes Template"](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

*"Have you had any further ideas/developments since we last spoke?"*

*"How are you travelling with your high level task?"*

*"Let's break down this high level task into smaller, more achievable steps"*

*"Let's make a list of all potential roadblocks and ways to overcome them"*

It would be great to conclude this session with a refined six-month goal timeline.

## Some resources that may help with this session

- ↓ [Lisnic's Kaizen \(Continuous Improvement\) Checklist](#)  
This process works towards continuous improvement by setting up an organised workspace
- ↓ [Lisnic's My A-Team Roadmap](#)  
A checklist that will enable you to evaluate how close you are to getting the best out of your team

## What do I need to prepare for the next session?

# Session 4: Reinforcing accountability

## Session objectives

- 1 To review your Advisee's progress on their low level tasks
- 2 To check your Advisee's progress on their high level tasks
- 3 To refine and adjust your Advisee's goal timeline

Direct your Advisee to the ["Effective Meeting Notes Template"](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

- "How are you feeling about your progress so far?"*
- "How do you plan to get feedback from team members / users?"*
- "Run me through your game plan for the next 30 days"*
- "What are your concerns moving forward with these changes"*

It would be great to conclude this session with a plan on how to implement the first stage of your Advisee's high level task.

## Some resources that may help with this session

- ↓ [Lisnic's Effective Decision Making Framework](#)  
This document has a list of handy questions that will make you stop and consider each stage of your decision making
- ↓ [Lisnic's Team Communication Checklist](#)  
This document outlines what to keep in mind for any lines of communication within an organisation

## What do I need to prepare for the next session?

# Session 5: Moving the needle

## Session objectives

- 1 To review your Advisee's progress on their low level tasks
- 2 To participate in a detailed debrief of your Advisee's progress since the last session
- 3 To refine and adjust your Advisee's goal timeline

Direct your Advisee to the ["Effective Meeting Notes Template"](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

*"Did you implement the first step of your task, if yes, congratulations! Walk me through your actions"*

*"Did you implement the first step of your task, if no, let's walk through your setbacks and reset"*

*"Have you received any feedback from your team or clients?"*

*"What new opportunities do you see coming out of this?"*

It would be great to conclude this session with a detailed S.W.O.T. analysis of your Advisee's progress since session 1.

## Some resources that may help with this session

- [↓ Lisnic's Agile Retrospective Template](#)  
This document identifies how to improve a team's functionality by reflecting on completed projects
- [↓ Lisnic's Issue Tracking Template](#)  
This document walks you through how to identify a problem, analyse the causes, brainstorm solutions and check their feasibility
- [↓ Lisnic's Troubleshooting Roadmap](#)  
This template presents a framework that will help troubleshoot by systematically approaching a problem, breaking it down and solving it

## What do I need to prepare for the next session?



# Session 6: Hitting major milestones

## Session objectives

- 1 A detailed debrief on your Advisees progress in the past 5 sessions
- 2 To sketch a timeline of goals that include high and low level tasks to complete and review in future sessions

Direct your Advisee to the [“Effective Meeting Notes Template”](#) (Lisnic Resources) to categorise any notes they make during / post session.

## Conversation starters

Use the following ideas to get the conversation flowing:

<p><i>“What would you like to work on next?”</i></p>	<p><i>“Talk me through your goals for the rest of the year”</i></p>
<p><i>“Let’s work backwards and put a timeline in place to achieve some of these goals”</i></p>	<p><i>“How are you going to track these goals? Let’s brainstorm some KPI’s”</i></p>

It would be great to conclude this session with a new six-month goal timeline.

## Some resources that may help with this session

- ↓ [Lisnic’s SMART Goal Setting Framework](#)  
This document outlines both Buffet’s 25/5 goal setting methodology and the SMART goal setting framework
- ↓ [Lisnic’s Time Management Tools](#)  
This document details how to best utilise your time at work using the 1-3-5, GTD, Pomodoro and Pareto techniques
- ↓ [Lisnic’s Career Development Template](#)  
This template allows you to chart your professional goals and to identify future opportunities and limitations

## What do I need to prepare for the next session?

# Session 7: Repeat 2 to 6

## Session objectives

1

Celebrate all you have achieved with your Advisee and really appreciate how far you have both come

2

Don't lose momentum and continue to level up together

By now you are well on your way to a long-lasting relationship!

Using the timeline you created in your last session, **go back to session #2 and repeat.**

Growth is infinite and beyond the current level, there is always another waiting to be reached.