

A step-by-step worksheet to help you identify, connect with, and grow alongside a trusted circle of advisors.

Whether you're looking for a promotion, expanding your influence, or simply becoming a stronger professional, growth doesn't happen in a vacuum. A personal advisory board offers clarity, accountability, and confidence by putting trusted people in your corner — people who help you see further, reflect deeper, and step more boldly into what's next.

This tool will help you:

- Define your growth goals
- Identify what kind of support you need
- Choose the right advisors
- Reach out with intention
- Track engagement and reflect on progress

Step 1: Clarify Your Growth Goals

Start by identifying where you're trying to grow. This step will shape who you need and how they can support you.

What are you working toward in the next 6–12 months? (Choose all that apply or write your own.)

- ☐ Preparing for a promotion
- ☐ Strengthening leadership skills
- ☐ Improving communication or visibility
- ☐ Expanding my strategic thinking
- ☐ Transitioning into a new role or industry
- ☐ Building confidence or overcoming self-doubt
- ☐ Learning to delegate or influence
- ☐ Other: _____

Now describe your primary goal in one sentence:

👉 “I want to...”

Step 2: Identify the Roles You Need

Use the chart below to determine which types of support would be most valuable to you.

Role	What They Offer	Do I Need This?
🌟 Mentor	Offers experience and wisdom from the path ahead	<input type="checkbox"/> Yes <input type="checkbox"/> No
💡 Challenger	Pushes you to think differently and level up	<input type="checkbox"/> Yes <input type="checkbox"/> No
🤝 Connector	Introduces you to people, tools, or opportunities	<input type="checkbox"/> Yes <input type="checkbox"/> No
👂 Listener	Gives you space to reflect and process decisions	<input type="checkbox"/> Yes <input type="checkbox"/> No
🚀 Champion	Believes in you, cheers you on, and reinforces your value	<input type="checkbox"/> Yes <input type="checkbox"/> No

You don't need all five—but aim for at least three distinct roles.

Step 3: Brainstorm Potential Advisors

For each role you've selected, brainstorm 1–3 individuals who could fill that space.

Role	Candidate Name(s)	Why Them?
e.g., Mentor	John Doe	Previously he held my current role and was considered an expert in this role; it resulted in his promotion.
Mentor		
Challenger		
Connector		
Listener		
Champion		

💡 *Tip: Consider current or former colleagues, mentors, friends, coaches, community members, or even people you follow online who inspire your thinking.*

Step 4: Prepare Your Outreach

For people you plan to engage directly, use the following template to draft your message:

Subject: Seeking Your Insight for My Growth

Message Example:

Hello [Name],

I'm working intentionally on my career development this year, and I'm building a small personal advisory board — a handful of people I trust to offer perspective and encouragement as I grow.

I'd really value your insights around [area of growth or challenge]. Would you be open to a quick call every couple of months, or a check-in when I'm facing a key decision?

Your experience and perspective would mean a lot, and I'll be sure to keep it low-pressure and respectful of your time.

Let me know if you're open to it!

Regards,

[Your Name]



Step 5: Engage and Reflect

Use the table below to track your board's engagement and reflect on its impact.

Advisor Name	Role	Engagement Plan ¹	Last Check-In	Notes / Takeaways
e.g., John Doe	Mentor	Quarterly coffee chat	May 7, 2024	John suggested I need to improve my personal communication skills.

¹ The **Engagement Plan** refers to *how you intend to stay in touch with each advisor* over time. It's about setting expectations — for yourself and, if appropriate, for them.

Here are some examples you could include:

Engagement Plan	What It Means
Quarterly coffee chats	Meet in person or virtually every 3 months to check in
Monthly email update	Send a brief progress update or question each month
Informal as needed	Reach out occasionally when facing decisions or challenges
Project-based check-ins	Connect during specific projects or development phases
Annual reflection conversation	One deep conversation per year to reflect and plan

It's not a contract — just a reminder of *how* you'll activate and nurture that relationship. This keeps your advisory board from becoming a list you never use.

Step 6: Reassess & Refresh (Optional)

💡 *Tip: Set a recurring calendar reminder every 6 months to revisit this tool and refresh your board.*

- Who has been most helpful?

- Are there roles you still need filled?

- Are you ready to rotate someone out — or bring someone new in?

Reflection Prompt:

👉 *“One thing I’ve learned about myself through this process is...”*

Your development doesn’t have to happen alone. Surround yourself with insight, encouragement, and challenge—and watch what becomes possible.