

Relationship Filter Exercise

Use this exercise to recall and unpack behaviors or patterns that have rubbed you the proverbial wrong way in current or past advisory relationships. Reference the table below for concrete examples. Once you have vented the negatives onto the page, convert them to aspirations to create your higher bar.

Behavioral Misfires: select a specific advisor or firm to contemplate. Recall as many moments as you can in which you noticed the other party behaving in a manner that sat uncomfortably outside of your core values. Perhaps they cancelled a meeting at the last minute, forgot to do an essential piece of research you requested, or chose not to own their behavior. Maybe, they took more time than you'd like furtively defending a product or strategy, and you felt sold. Use the examples in the table below to stimulate your thinking. After you have completed the left-hand column proceed to the Relational Wins column. Importantly, discipline yourself to vent all of the misfires before moving into the positives.

Relational Wins: next, recall moments in which another person's character shone so brilliantly you almost reached for your sunglasses. Recall the choices that made you proud to be in relationship with them. Record your thoughts in the middle column of the table.

My Higher Bar: now you are ready for the fun stuff. Scan the first two columns for experiences that are opposite sides of the same behavioral coin. Convert them to flags of courage that you will plant in vetting for ideal fits, and for stewarding existing and long-term relationships.



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Behavioral Misfires

The answer to a question felt like a cover-up and it made me wonder what other cover-ups came before this one.

I felt like they were recommending and defending a strategy they designed for someone else without hearing my fact pattern uniquely.

They posed all the important questions directly to me, even though my spouse (and emotional rock) was sitting next to me.

Relational Wins

They noticed a fellow advisor's mistake and supported them in fixing it, instead of opportunistically throwing them under the bus.

They prioritized family over work that could wait another day without damaging an outcome.

They treated my assistant with genuine compassion and gratitude.

They made a technical mistake, yet they converted it to a positive.

My Higher Bar

Candor matters even when the content is painful or disruptive.

Compassion prevails; humans make mistakes. We unpack them for future clarity not current blame.

We treat each other and everyone else with equal kindness regardless of role and absent hierarchy.

We own our behavior and ask other people to be equally accountable.



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