

TRIBE VIBE ASSESSMENT

1. Identify your current "go to" professionals in each of the following categories:

Legal/Financial

ATTORNEY, ELDER LAW & ESTATE PLANNING, FINANCIAL PLANNING, CPA

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Clinical Providers

CARE MANAGEMENT, FAMILY MEDIATION, HOME CARE, VNA, HOSPICE, COMMUNITIES

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Support Services

ESTATE SALES, DONATION, CLEAN-OUT SERVICES, MOVERS

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

Real Estate

AGENT, REAL ESTATE ATTORNEY, APPRAISER, HOME INSPECTOR

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

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IDENTIFY GAPS:

People have the ability to drain or sustain you. Use this experience to identify which professionals take you out of your flow or help you manage and grow with peace of mind.

After you have completed the professional assessment grid, take a moment to be real with yourself and ask:

1. Does my current tribe align with my goal(s) and client need(s)?
 - Celebrate the members that vibe with you! Identify why they are a great fit and of value to you.
(You will use this information later to further develop your tribe.)
 - If the answer is no, ask yourself: What attributes of a person/professional do I need to compliment my work flow? List personality traits and strengths needed.
2. Go deeper! Of the professionals listed, who do I jive well with?
3. What characteristics of this individual allow me to work so well with them?
(**REMINDER:** Your tribe is a representation of you and your reputation. Know your tribe well!)
3. Do I have enough professionals in each category?
4. Which professionals can help me identify potential new tribe members?
5. What is the best way for me to 'seek and keep' tribe members?

NOTES:
