

Personal Board of Advisors Matrix

January 2026 | Week 3 | Build Your Support Network

Your Personal Board of Advisors

Purpose: No builder succeeds alone. This exercise helps you identify the 5 key roles you need on your personal advisory board and map who currently fills them (or where you have gaps).

The 5 Essential Roles

Every builder needs these five types of advisors. You might have one person filling multiple roles, or multiple people in one role. The goal is to ensure you have access to all five perspectives.

1. The Mentor

What they provide: Wisdom from experience. They've walked your path 5-10 years ahead and can help you avoid costly mistakes.

Who fills this role for you?

If no one yet, who could you approach?

What specific guidance do you need from them?

****Example:**** A former executive who successfully transitioned to fractional work. They can advise on pricing, client acquisition, and work-life balance.

2. The Connector

What they provide: Access to networks and opportunities. They know everyone and love making introductions.

Who fills this role for you?

If no one yet, who could you approach?

What connections do you need from them?

****Example:**** A well-networked professional in your industry who regularly introduces people and opens doors. They can connect you to potential clients, partners, or collaborators.

3. The Challenger

What they provide: Honest feedback and tough questions. They push you out of your comfort zone and call out your blind spots.

Who fills this role for you?

If no one yet, who could you approach?

What hard truths do you need to hear?

****Example:**** A peer who isn't afraid to tell you when your pricing is too low, your pitch is unclear, or you're playing it too safe. They care enough to be brutally honest.

4. The Cheerleader

What they provide: Encouragement and belief. They celebrate your wins, remind you of your strengths, and keep you going when you doubt yourself.

Who fills this role for you?

If no one yet, who could you approach?

When do you most need their support?

****Example:**** A trusted friend, spouse, or colleague who believes in you unconditionally. They're your first call when you get good news or need a confidence boost.

5. The Expert

What they provide: Specialized knowledge in areas where you're weak. Legal, financial, technical, or domain-specific expertise.

Who fills this role for you?

If no one yet, who could you approach?

What expertise do you need access to?

****Example:**** A CPA who understands independent contractor taxes, a lawyer who specializes in consulting contracts, or a tech expert who can advise on tools and systems.

Your Board Summary

****Current Board Members (list all names and their roles):****

****Biggest Gaps (which roles are missing or weak?):****

****Action Plan (who will you reach out to this month?):****

****💡 Pro Tips for Building Your Board:**** - ****Start with who you know**** — Your board doesn't have to be famous people. The best advisors are accessible and invested in your success. - ****Be specific in your asks**** — "Can I pick your brain?" is vague. "Can I get 30 minutes to ask about your pricing strategy?" is clear. - ****Offer value first**** — Before asking for help, think about what you can offer them (introductions, expertise, feedback). - ****Formalize it (or don't)**** — Some people like official "advisory board" relationships. Others prefer informal check-ins. Do what works for you. - ****Rotate as you grow**** — Your board will evolve. The mentor you need today might be different in two years.

How to Approach Potential Board Members

The Outreach Template

Subject: Quick question about [specific topic]

Hi [Name],

I've been following your work in [area] and really admire how you [specific achievement or quality].

I'm currently [your situation/transition], and I'm building a personal advisory board to help guide my next chapter. Your experience with [specific expertise]

would be incredibly valuable as I navigate [specific challenge].

Would you be open to a 30-minute conversation? I'd love to learn about [specific question] and get your perspective on [specific challenge].

I'm happy to work around your schedule. And of course, if there's anything I can help you with—whether it's [your expertise] or simply making an introduction—I'm glad to return the favor.

Thanks for considering,
[Your Name]

Maintaining Your Board Relationships

- **Schedule regular check-ins** — Quarterly coffee/calls keep relationships warm
 - **Share updates** — Let them know how their advice helped (people love to see impact)
 - **Make introductions** — Connect your board members to each other or to people in your network
 - **Celebrate their wins** — Congratulate them on promotions, launches, or milestones
 - **Don't only reach out when you need something** — Build the relationship before you need it
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Next Steps

1. **Complete this matrix** (allow 30-45 minutes)
2. **Identify your top 3 gaps**
3. **Draft outreach messages to 2-3 potential board members**
4. **Send those messages this week**
5. **Share your board strategy with your GSD Pod** for feedback

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