



**TREK INSTITUTE**  
A BASE CAMP CO-OP FOR SUCCESS

# TREKIN GUIDE BOOK

**CAMPFIRE**

LEVERAGING STRENGTHS FOR GROWTH

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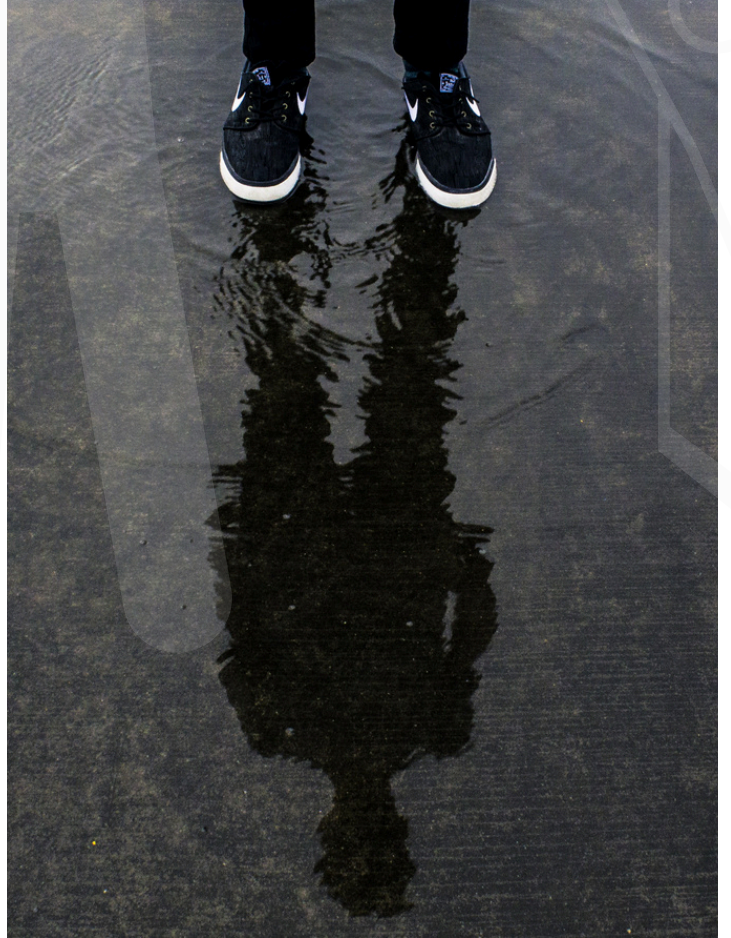
# THE POWER OF SELF-AWARENESS

*Leveraging Personal Strengths for Professional Growth*

Growth, whether personal, professional, or business-wide, doesn't come from simply fixing weaknesses. True, sustainable growth happens when individuals understand their natural strengths and limitations and learn how to apply that awareness in a team-based environment. Self-awareness is the foundation of effective leadership, collaboration, and long-term success.

There is often too much focus on aspects that need to improve, rather than maximizing the strengths that already exist. While improvement is important, research shows that individuals and teams thrive when they build upon what they naturally do best. When strengths are properly leveraged, productivity increases, collaboration improves, and business goals are reached with greater efficiency.

However, understanding strengths isn't just an individual exercise; it's essential for team dynamics as well. A well-balanced team isn't made up of people who all think and operate the same way; it's built on complementary strengths that, when combined, create a stronger whole. When individuals recognize not only their own strengths but also the strengths of those around them, communication becomes smoother, workflows become more efficient, and conflict is reduced.





## Using Strengths for **TEAM COLLABORATION**

Understanding individual strengths is essential, but the real impact comes when those strengths are intentionally integrated into a team-based environment. A business doesn't succeed because one person is great at everything, it thrives when individuals contribute their unique strengths in ways that enhance overall efficiency, communication, and decision-making.

Two widely used tools, the VIA Strengths Assessment and the DiSC Assessment, offer valuable insights into both personal motivation and team collaboration styles.

**VIA Strengths Assessment** focuses on character strengths and intrinsic motivation, identifying qualities like creativity, perseverance, leadership, and kindness. These strengths help individuals understand what drives them and how they approach challenges.

**DiSC Assessment** evaluates how people interact in a team setting, categorizing individuals based on dominance (D), influence (I), steadiness (S), and conscientiousness (C). This tool provides clarity on communication preferences, work styles, and potential areas of conflict within a team.

By combining both assessments, individuals and teams get a full picture of how to operate more effectively. A person may discover that their natural leadership ability (VIA) aligns well with their high dominance score in DiSC (D), confirming that they thrive in decision-making roles. On the other hand, someone who scores high in conscientiousness (C in DiSC) but has perseverance as their top VIA strength may excel in quality control and process optimization, ensuring details aren't overlooked.



After this episode, you'll take your VIA assessment and dive into an expert-led collaborative session to start building off of your strengths!



**THE TREKCAST**  
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## CASE STUDY

### A Collaborative Success



Lakefront Advisors, based in Chicago, was founded by advisor Grant Mercer. Like many advisors starting out, Grant wore every hat in the business – from client meetings to paperwork, compliance, and even marketing. For a time, he managed, but eventually the weight of trying to do everything began to impact both his effectiveness and his client experience.

#### The Challenge

When Grant brought on his first team member, he quickly realized that hiring help doesn't automatically solve role misalignment. Though his new hire was supposed to focus on client service and day-to-day flow, she was still the only team member, which meant she was also asked to take on marketing tasks. Despite her best efforts, these tasks drained her energy and motivation. Marketing wasn't her strength, and the strain pulled her away from what she excelled at, which was connecting with clients and ensuring smooth service.

As the business continued to grow, Grant added an additional team member to help provide additional administrative support. This new role was expected to help directly with strengthening client connection, but it soon became clear that she was not naturally comfortable in that type of client-facing role. However, she excelled at detail-oriented, behind-the-scenes work such as organizing data, tracking requests, and ensuring accuracy.

The challenge for Lakefront Advisors was clear: the right people were in the business, but they were not yet in the right roles.

#### The Solution

Grant and the team began to openly discuss strengths and weaknesses. They reframed the question from "Who can do this?" to "Who should do this?"

- Marketing was outsourced, freeing Marisa to lean fully into her client-service strengths.
- The lead admin was able to focus on communication and relationship-building, which improved both her energy and the client experience.
- The new hire shifted away from client-facing tasks and into a support role behind the scenes, where her attention to detail and organizational skills strengthened operations.

By making these adjustments, Lakefront Advisors didn't need to add more people, they simply needed to realign responsibilities to better match each person's strengths.

#### The Results

- **Improved Efficiency:** With tasks aligned to the right people, work moved faster and smoother.
- **Better Client Experience:** The lead admin had the bandwidth to focus on relationships, while the new hire provided operational support, ensuring nothing fell through the cracks.
- **Higher Team Morale:** The team as a whole reported feeling more comfortable and engaged in their work once they were freed from tasks that didn't fit their strengths.
- **Sustainable Growth:** Grant was able to return his focus to client meetings and business development, confident that the team was functioning in its lanes.





## Playing to your **STRENGTHS FOR GROWTH**

Traditional goal setting often focuses on fixing weaknesses, identifying areas where performance is lacking and creating plans to improve. While improvement is important, this approach can sometimes be demotivating and inefficient. A strengths-based approach to goal setting shifts the focus to what individuals naturally do best, leveraging those strengths to enhance productivity, engagement, and long-term success.

When goals are built around strengths rather than weaknesses, individuals experience:

**Greater motivation-** Working on something they naturally excel at feels energizing rather than draining.

**Higher resilience -** People are more likely to stay committed to goals that align with their intrinsic abilities.

**Better outcomes -** Leveraging strengths leads to faster skill development and higher performance compared to trying to improve weak areas.

Goal	Strength-Based Goal
Improve leadership skills	Leverage natural leadership and mentor a junior associate or paraplanner to help expand their knowledge
Enhance client communication	Use active listening skills to foster deeper client relationships
Develop better time management	Utilize organizational strengths to refine workflow processes
Boost confidence in sales conversations	Use storytelling and natural persuasion skills to enhance client engagement

### Applying Strengths-Based Goals to Teams

An individual's strengths don't exist in isolation. They become a critical asset to the entire team. A strengths-based team is not simply a collection of talented individuals but a cohesive unit where each person's abilities contribute to the collective mission in an intentional way. Rather than trying to force individuals into rigid roles that may not align with their natural talents, a strengths-based approach structures responsibilities in a way that allows each team member to work within their areas of expertise while supporting broader team goals. When people operate within their strengths, workflows

become more efficient, collaboration becomes smoother, and friction is minimized. Instead of struggling to fit into predefined roles that may not suit their skill sets, individuals are empowered to contribute in ways that feel natural and impactful. This shift in approach optimizes team performance by ensuring that responsibilities complement, rather than compete with, each other, fostering an environment where each person is able to thrive. By aligning goals with strengths, teams not only enhance individual job satisfaction but also improve overall business success by making day-to-day operations more seamless and productive.