

PRESENCE AUDIT · FOR FINANCIAL LEADERS

The Sniff Test

Before anyone partners with you, joins you, or puts you on a stage, they look you up. This is what they find, and whether it reads like authority.

You are looked up before you are backed.

Authority is the asset, and most of it gets decided before anyone commits. The people who can lift a leader, a partner weighing an alliance, a strong recruit deciding whether to join, a journalist deciding whether to quote you, an allocator sizing you up, all do the same thing first. They look you up. That search is the real audition.

An introduction gets you considered. It does not make you a voice. You were introduced for a reason, some version of the point of view you are known for. The person then checks whether your presence backs it up. If your work, your profile, and your bio all say the same confident thing, authority compounds. If page one is a thin company bio, or your LinkedIn says one thing while your talks say another, the introduction quietly fades and you never know it happened.

The bigger the platform, the better the partner, the more serious the recruit, the harder they look. They have more at stake, so they do more diligence, and they are far more sensitive to a leader whose presence does not match the reputation that preceded them.

This document is a way to see yourself the way those people see you. Not the bio you wrote when you took the title. How it lands today, across every surface, as one impression of whether you are a voice worth backing.

Four surfaces. One verdict.

The sniff test does not happen on a single page. It happens across four surfaces, in about four minutes, and the viewer blends them into one read on your authority. Most leaders have never looked at all four together as one system. The people deciding whether to back you always do.

01 · GOOGLE

The first move

They search your name. Page one either shows a body of work, or a thin bio and whatever the algorithm surfaced.

02 · LINKEDIN

The authority read

Not just your headline. What you post and share is the clearest signal of whether you actually hold a point of view.

03 · PUBLISHED WORK AND PRESS

The third-party read

Where you have spoken, been quoted, or published. The proof that others already treat you as a voice.

04 · THE BIO

The controlled read

Your leadership bio or personal page, the one surface you fully own, and the most common place a leader sounds generic.

Five things have to be true.

Run every surface through these five. The audit prompt later in this document scores each one for you, but read them first. They are the standard the whole tool is built on.

01 Coherence

The same leader shows up across the bio, the profile, the talks, and the writing. One point of view everywhere. The fastest way to fail is a confident bio attached to a silent or scattered profile.

02 Differentiation

Swap your name for any other industry leader's. Does it still read as true? If it does, you have no authority, just the vocabulary everyone uses. The point of view you are known for has to be unmistakable.

03 Narrative Control

For a leader this is the whole game. When someone searches you, does page one show your own work, your talks, your writing, your features, or a thin bio and whatever the algorithm surfaced? Authority is owning your own name.

04 Proof, Authority

Visible evidence that you are a voice: published thinking, speaking, press, board and industry roles, a body of IP. This is a different kind of proof than a practice relies on. See the note below.

COMPLIANCE · READ THIS

Authority is your proof, with one caution.

For a leader, proof leans on what a client quote cannot: published thinking, speaking, press, and roles. Harder to fake than a testimonial. One caution: if you are a principal of an RIA, your personal content can count as the firm's marketing, which brings the SEC Marketing Rule back in. Confirm with your firm. (Not legal advice. Confirm anything client-facing with your compliance team before it goes live.)

The score that decides it.

05 The Sniff Test

The net effect. If someone was introduced to you as a leader worth knowing, and spent four minutes verifying, would they come away more convinced you are a voice worth backing, or less? This is the score that decides whether the platform, the partnership, or the recruit actually happens.

Run this on yourself.

Gather your surfaces with the checklist near the end, then paste everything into Claude (preferred) or your large language model of choice and run the prompt below. It scores you on all five dimensions, names the single highest-leverage fix, and builds a branded report you can download, plus a plain text version you can forward to compliance.

PROMPT 01 · THE AUDIT · PASTE INTO CLAUDE

You are a brand and presence auditor for leaders in financial services: founders, principals, and executives who set the direction of a firm but do not personally advise clients. For a leader, authority is the asset, and the people who matter, a potential partner, a recruit you want to attract, a journalist, an event, an acquirer, all verify you online before they commit. They check Google for your name, your LinkedIn profile and what you post, where you have spoken or been quoted, and your bio. You also understand U.S. compliance: if you are a principal of an RIA, your personal content can be treated as firm marketing, and the SEC Marketing Rule restricts testimonials and endorsements about advisory services. So flag anything that could read as a client endorsement and tell me to confirm with my firm, but recognize that peer recognition, press, and speaking are a different and available kind of proof. Be direct. I would rather hear it now than lose the partnership, the recruit, or the platform later.

Here is everything someone would find when they look me up:

- MY NAME:
- WHAT I WANT TO BE KNOWN FOR (the point of view or expertise that makes me a voice):
- WHO I'M TRYING TO REACH (partners, recruits, press, peers, allocators):
- GOOGLE (titles/snippets for my name):
- LINKEDIN (my headline, About, and what I actually post):
- PUBLISHED WORK AND PRESS (talks, articles, podcasts, features, or "none"):
- BIO (my leadership bio or personal site copy, or "none"):

STEP 1. Audit me in writing, here in the chat, first. Score each dimension 1 to 10 with a one-line reason:

1. COHERENCE - the same leader across the bio, the profile, the talks, and the writing?
2. DIFFERENTIATION - swap my name for any other industry leader's. Still true? Then I have no authority.
3. NARRATIVE CONTROL - do I own page one with my own work, or is it a thin bio and the algorithm?
4. PROOF (AUTHORITY) - published thinking, speaking, press, roles, and IP. Flag anything that reads as a client endorsement of advisory services as a risk to confirm with my firm.

5. THE SNIFF TEST - after 4 minutes, would a partner, a recruit, or a journalist be more convinced I am a voice worth backing, or less?

Then give me THE VERDICT (one paragraph, do I read as a credible leader today?), THE ONE FIX (the single highest-leverage change, not a list), and COMPLIANCE FLAGS (you are not my compliance team, so flag it and tell me to confirm with my firm).

STEP 2. Then build a branded report as a single downloadable HTML file titled "The Sniff Test," using only what is in the audit above. Include my name and the date, a composite score out of 50, the verdict, the five dimensions each with its score, a thin score bar, the one-line reason and a Next Step, a dark One Fix block, and the compliance flags with a short disclaimer. Style it: parchment background #FAF8F0, near-black ink #211D18, cognac accent #8C6840, display font Cormorant Garamond, body font Inter, square corners, hairline rules, small-caps labels, no em dashes. Add an @page Letter rule, print-color-adjust exact, break-inside avoid on each block, and a fixed "Save as PDF" button that prints cleanly and hides on print.

STEP 3. If you can run code, also render that HTML to a true PDF with the fonts embedded and give it to me as a download.

STEP 4. Also give me a plain, black-and-white, text-only version of the whole audit, no color or graphics, that prints on any printer and is easy to forward to a compliance reviewer.

If you cannot create files, do all of STEP 1 as text, then paste the report HTML in a code block so I can save it myself, with the black-and-white version below it.

Tip: screenshot your Google results page and paste it in too. The model can read it.

Fix the weakest surface.

The audit tells you where your authority is leaking. This pass closes it. Run it right after the audit, in the same conversation, so the model still has the full context of what it just scored.

PROMPT 02 · THE REWRITE · RUN RIGHT AFTER THE AUDIT

Using the audit you just ran, rewrite my weakest surface so it reads like a leader with a point of view.

My position: [paste your positioning statement. If you don't have one yet, run The Positioning Blueprint first, then come back].

Rewrite [my LinkedIn headline and About / my leadership bio / my personal site headline] so it:

- says the same thing across the bio, the profile, and the work (coherence),
- could only be me, with no line another industry leader could claim (differentiation),
- makes the point of view I am known for unmistakable in the first two lines,
- leans on authority, published thinking, speaking, press, and roles, not client outcomes (compliance),
- sounds like a person with conviction, not a corporate bio.

Give me two versions, one tighter, one warmer. Then tell me which you'd pick and why.

Gather your surfaces.

Five minutes of collection makes the audit ten times sharper. Open a blank note and grab each of these before you start the prompt.

Your name, exactly as it appears publicly

Including any credential or title you actually use in public.

Your Google results

Search your name. Copy the top result titles, or screenshot page one.

Your LinkedIn headline, About, and recent activity

What you post and share, not just the profile. The activity is the authority signal.

Where you have published or been featured

Talks, articles, podcasts, press. If there is none, write "none." That is itself a finding.

Your leadership bio or personal site

The headline and the opening copy, pasted as written, or "none."

The point of view you want to be known for

In one sentence. The benchmark everything is measured against.

If the surfaces don't match, the leak is upstream.

When the audit says your presence is incoherent or undifferentiated, the instinct is to go polish the bio. Sometimes that helps. Often it does not, because there was never a single point of view for the surfaces to express. You cannot make the bio, the profile, and the talks say the same thing until you have decided what that thing is.

That decision is what The Positioning Blueprint is for, run on you as a leader rather than on a practice. Pick the point of view. Pressure-test it until it holds. Then this audit becomes simple maintenance: you are just confirming that every surface still says the one thing you are willing to be known for. The two tools are a sequence: decide, then prove.

THE HONEST CLAIM

This won't make you a leader.

It tells you whether your presence already reads like one, before the partner, the recruit, or the journalist decides. The work of earning the authority is still yours. This just makes sure that when the introduction comes, your presence confirms you are a voice worth backing instead of quietly suggesting you are not.

Frameworks and credit: presence and trust thinking draws on classic brand coherence principles. Compliance framing reflects the SEC Marketing Rule (2021). Always defer to your own firm's compliance authority.