



BUSINESS
BUILDERS
ACADEMY™

The Art of Partnership™

For Team Members



Name:

Date:

About ClientWise LLC



ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results. Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you get **clear**, get **focused**, and get **results**.

Get **Clear**. Get **Focused**. Get **Results**.™



The Art of Partnership™

For Team Members

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Perhaps more than any other single factor, the long-term success of your advisory business will hinge on the mutual accountability and sense of partnership you're able to establish between each and every member of your team.

To achieve 'deep partnering,' however, you first need to define rules and structures for working together, foster an environment that values interdependence, and lay the groundwork for genuine collaboration—with team members who regularly speak in terms of we rather than I, and who demonstrate an ongoing willingness to lift each other up.

The ClientWise Principles for Deep Partnering™

- 1 Regardless of title and position, hold each other as partners in all aspects and parts of each conversation.
- 2 Frequently acknowledge the value that each individual brings to the team and how the team would be less without that value.
- 3 Do not elevate one team member's value or type of value over another team member's value or type of value.
- 4 Treat the needs of the business as separate and distinct from the needs of individual team members.
- 5 Voice concerns early and resolve them. Concerns that linger in silence can create fractures in the partnership.
- 6 In conversation, be fully present to one another with complete and focused attention.
- 7 Listen completely and non-reactively to what your team members have to say.

- 8** Seek to understand each other's point of view without judging it as right or wrong.
- 9** Seek and value each other's input, thinking, opinion, creativity, and ideas in all aspects and parts of each conversation.
- 10** Declare where you agree and where you disagree and treat both declarations as equally valid and valuable.
- 11** Use where you agree to illuminate potential solutions for where you disagree.
- 12** Look at the facts of disagreement to solve the disagreement and do not personalize areas where you disagree.
- 13** Declare when you need more time to think about an issue and do not rush to agreement simply to have agreement.
- 14** If a disagreement seems insurmountable, do not try to get others in the team to take sides. Instead, seek wisdom and help from a coach or mentor who can help create new perspectives on the dilemma.
- 15** As agreements and plans are shaped and issues resolved, acknowledge the way you partnered together to make progress.
- 16** Determine together how and when you will communicate decisions to other stakeholders and clients.

These principles, if followed, create lasting and gratifying partnerships. Consider them and their potential application as you assess your alignment as partners.

Notes:

The Partnership Alignment Assessment™

Every team member is different and unique. So whenever team members come together, there's a great deal of work required to align beliefs, actions, and operations beyond merely sharing the same organizational name and space. The following is a first step in that process. Please review these statements designed to help you think about what a true partnerships entails.

For each of the following sections, fill in your name and your team member names and select whether you strongly disagree, disagree, agree, or strongly agree with each statement.

We've provided a worksheet for you to write in the scores of your team members. This will enable you to see what others have to share, identify areas of change or improvement, and see precisely where you align as a team and where there may be gaps.

DEEP PARTNERING

1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

Fill in your name and your team member(s) name and rate each statement, for each person, on a scale of 1-4.	My Score	Team Member	Team Member	Team Member	Team Member	Team Member
1. My teammates and I hold each other as partners in all aspects and parts of each conversation.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
2. My teammates and I are fully present to each other in conversation. We seek and value each other's input, opinion, thinking, creativity, and ideas.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
3. My teammates and I frequently acknowledge the value that each individual brings to the team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
4. My teammates and I do not elevate one individual's value or type of value over another individual's value or type of value.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
5. My teammates and I treat the needs of the business as separate and distinct from the needs of individual team members whenever making decisions.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
6. My teammates and I voice any concerns early and resolve them. We do not stay silent about concerns that could create fractures in the partnership.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
7. My teammates and I declare where we agree and disagree and we treat both declarations as valid and valuable.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
8. When we disagree, my teammates and I listen completely and non-reactively to each other and seek to understand the other's point of view without judgment. We are fully capable of engaging in constructive conflict.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
9. My teammates and I look to the facts of any disagreement to solve the disagreement and we do not personalize our disagreements with one another.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
10. My teammates and I use past joint successes and areas of agreement to find solutions to disagreements.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
11. My teammates and I easily declare when individually or collectively we need more time to think about an issue and we grant each other that time.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
12. My teammates and I do not ask others in the team to take sides when we disagree and we seek outside help when needed to come to agreement.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
13. My teammates and I regularly acknowledge and celebrate how we partner together to resolve issues, make progress, and create success.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
14. My teammates and I jointly determine and align around how and when to communicate decisions to our internal and external stakeholders.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④

1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

7

LEADERSHIP

1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

Fill in your name and your team member(s) name and rate each statement, for each person, on a scale of 1-4.	My Score	Team Member	Team Member	Team Member	Team Member	Team Member
1. My team and I have a shared future vision (3-5 years) of how we want our enterprise to grow .	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
2. My team and I have translated that vision into specific goals and success metrics that are well documented and have been communicated to the team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
3. My team and I have assessed the various strengths and weaknesses of each individual and modified roles and responsibilities to best leverage everyone's individual strengths.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
4. My team and I are fully committed to leading an empowered organization where individuals are encouraged to take initiative, collaborate, and openly share ideas on how to enhance/improve processes and procedures.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
5. My team and I have leveraged our individual strengths to continually enhance our team's value proposition for our team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
6. My team and I have created specific performance goals for each member of the team that align with our client roster, revenue and profit growth goals/vision.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
7. My team and I have set clear, documented expectations for collaboration, conduct and behavior of all team members.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
8. My team and I are committed to soliciting individual feedback and incorporating beneficial suggestions into the operation of the business.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
9. My team and I have highly capable professionals that perform their jobs well.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
10. My teammates and I are committed to delegating responsibility to each other, so we can focus on the things that are our strengths and passions.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
11. My team and I agree on the behaviors and values that we expect individuals to project, and we're committed to reflecting those behaviors and values in our day-to-day functions.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④

LEADERSHIP

1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member
1. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
2. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
3. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
4. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
5. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
6. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
7. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
8. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
9. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
10. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
11. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④

OPERATIONS

1=Strongly Disagree 2=Disagree 3=Agree 4=Strongly Agree

Fill in your name and your team member(s) name and rate each statement, for each person, on a scale of 1-4.	My Score	Team Member	Team Member	Team Member	Team Member	Team Member
1. My teammates and I have assessed our strengths and weaknesses to clearly define our individual roles and responsibilities within the organization.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
2. We have communicated this delineation of responsibilities so everyone knows who to approach to resolve various issues as they arise.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
3. My teammates and I regularly review our individual and team workflows, process and procedures to ensure that individually and as a team, we perform at the highest level.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
4. My teammates and I consistently review and update our best practices model to ensure consistent service delivery across all relationships.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
5. My teammates and I consistently review and update our ideal new client profile for the team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
6. My teammates and I share a unified approach for client reviews which we have documented for the team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
7. My teammates and I regularly review and update our team approach to client segmentation and service delivery and ensure it remains unified and formally documented.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
8. My teammates and I have reviewed and approved a marketing plan for the next 12 months that includes an activity calendar and budget.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
9. My teammates and I have created clear and formally documented job descriptions and development plans for all members of the team.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
10. My teammates and I regularly review and approve a team approach to compliance review policies and procedures and the most current policies and procedures have been clearly documented and conveyed to all team members.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
11. My teammates and I agree on how we are tracking leads, referral/introduction conversions and other new client acquisition metrics.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
12. Our team has identified and agreed upon next generation owners / leaders, and a succession plan has been memorialized.	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④

OPERATIONS									
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Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member	Team Member
1. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
2. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
3. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
4. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
5. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
6. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
7. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
8. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
9. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
10. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
11. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④
12. ① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④	① ② ③ ④

ADDITIONAL TEAM MEMBER QUESTIONS

Please list your team members names, the one thing you value most, and answer the additional questions.

Team member name:

One thing you value most:

If you could change or improve one aspect of their current approach to help the team thrive and succeed, what would you want to change?

How would you describe how they have contributed to leadership responsibilities?

What strengths would you like to see this team member showcase?

Team member name:

One thing you value most:

If you could change or improve one aspect of their current approach to help the team thrive and succeed, what would you want to change?

How would you describe how they have contributed to leadership responsibilities?

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