

VISION

Defining Your Future Team™



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**.

Notes:

Vision: Defining Your Future Team™

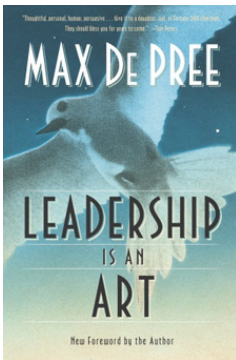
Max De Pree, in his classic book *Leadership Is An Art*, asked the simple question that every team leader should answer: “Would you rather work as part of an outstanding group or be one of a group of outstanding individuals?” The great team leader who develops a high performing team that produces significant sustainable success always chooses to work as part of an outstanding group. Creating an outstanding group, however, requires that the characteristics of that group be defined.

As the team leader/CEO, you will need to define what types of people you believe will best work and have the most success as a team. The act and art of defining the team members you will hire is worth a significant capital investment of time and thought. Such definition includes not only the skill set necessary for the team, but also the personality and attributes that you seek in team members.

We are going to have you explore eight areas of defining your team that will help you hire and develop a high performing team. As you are working with experience and skill set, keep in mind that you will probably need different and yet complementary skills from your team members. As you are working with personal characteristics, remember that these are characteristics you will probably want from every member on your team.

If you are developing a team, what you develop here will be your road map for hiring. If you are already leading a team, use this exercise to think through what is working and what is not on your team. See where there may be gaps on your team that should be filled or where you might need to work with an individual to strengthen a skill or characteristic you want more of from that team member.

There are two other important principles to remember. Please note that while we start with experience and skill set, personal characteristics may well be equally or more important to the functioning of a team. You should also remember that this exercise is meant to be a living document, not written in stone. You should revisit your definition in these areas at least twice a year as your team grows and changes and what you want from your team evolves.



“Would you rather work as part of an outstanding group or be one of a group of outstanding individuals?”

— Max De Pree

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To begin, please answer the following question. Your answer will guide your thinking as you consider areas of team design.

Ideally, what do you want the team you have built or are building to truly accomplish?

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Ideally, what **ambience** (character and atmosphere) do you want the team to have?

Keeping your answer in mind, please work through the next section on experience and skills. As you answer these questions, be broad and deep in your thinking about what is truly necessary to be successful. Do not limit yourself to only the easy and apparent skills and experience. These questions are meant to define each type of experience or skill that the team will need. The questions do not assume that all the types of experience and skills will rest in one person. For example, experience putting proposals together and experience engaging clients in new financial thinking may both be necessary, but may or may not sit in one team role or team member.

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In order to accomplish what you listed above, what various experience must members of the team possess?

3

In order to accomplish what you listed above, what various skills must members of the team possess?

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Based on my answers, what are my **current hiring or training** needs in order to have a truly high performing team?

As a leader, you have now established the technical requirements for your team. It is time to turn to those personal characteristics that will make a well working, high functioning, high performing, and easy to lead team. For this section, particularly keep in mind your answer to the question of what ambience you want your team to have.

Please think about the areas below carefully. If you are creating a team, these areas will be critical to creating a cohesive and productive team quickly. If you already have a team, think through again what the characteristics of your best members are and what are the characteristics of anyone who is struggling or not contributing to a great team environment and team success. This will help you with future hires. It may also tell you if there is anyone on your team currently who is not a good fit.

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What values (significant principles that shape daily behaviors and thinking) do I think team members should have that will create the right ambience and cohesiveness on the team? *For this question, assume that integrity, honesty, and a commitment to success are or should be givens for every hire and team member you currently have. Since these are givens, focus on other values or principles that you think may be important.*

6

In general, what personality traits do I think team members should have that will create the right ambience and cohesiveness on the team? *(Examples might be: relaxed, but highly diligent, or highly competitive, has a sense of humor or is very serious. What will work best depends in part on who you are and what kind of people you like around you as well as how much diversity or sameness you want in your team)*

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In general, what characteristics related to **growth and learning** do I think team members should have that will create the right ambience and cohesiveness on the team?

8

In general, what characteristics regarding **relating to others and teamwork** do I think team members should have that will create the right ambience and cohesiveness on the team?

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Based on my answers, what needs to be added to my hiring and/or team member interactions so that my team reflects what I am truly seeking to build? If I am leading a team, knowing that improving myself is the best way to improve my team members, is there any place I need to grow to be a better model of the characteristics listed in the answers above.

A. What actions will I take over the next quarter to ensure that the team has the characteristics that I have defined above?

B. What actions will I take over the next quarter to be a better model of the characteristics I have listed above?

With your answers, you should be getting clear about the definition of the team you want to build and be a part of.

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