



Leadership Lessons™

2026

clientwise™

— Est. 2006 —

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.**

Leadership Lessons™

What this year taught me as a leader

High-performing leaders rarely struggle with effort. Momentum is not the issue. Activity is not the issue. What is often lost is space. Space to step back from the pace of decision-making. Space to think clearly about what actually happened. Space to separate signal from noise before moving forward again. This annual reset is designed to create that space.

It is not about replaying the year or cataloging wins and misses. It is about extracting insight, sharpening judgment, and carrying forward what matters most. Reflection, done well, is not sentimental. It is practical. It turns experience into learning and learning into better choices.

Leadership does not pause long enough for neat review cycles. Decisions pile up while the business remains in motion. Clients still need care. Teams still need direction. Markets still move. The work of leadership continues even as perspective becomes harder to maintain. This is precisely why disciplined reflection matters.

The questions that follow are designed to slow your thinking just enough to regain clarity. They ask you to view the past year as data, not as a verdict. They invite you to notice patterns in how you lead when conditions are favorable and when they are not. They surface assumptions that may no longer serve you and strengths that deserve more intentional use.

This reflection is also future-facing. Each question links insight to choice. The goal is not awareness alone but direction. What do you want to repeat? What do you want to change? What do you want to lead differently as the next year unfolds?

Set aside uninterrupted time. Write to think, not to perform. There is no audience for these answers except you and the leadership decisions that will follow. Precision matters more than polish. Honesty matters more than completeness.

This guide is not meant to be completed once and set aside. It is meant to shape how you think throughout the year. Revisit your answers when trade-offs become harder. Return to them when your calendar fills faster than your priorities. Use them to anchor leadership conversations, coaching sessions, and moments when direction feels blurred.

Progress rarely announces itself. It compounds quietly through consistent choices made with clarity and discipline. This reflection is a starting point for that kind of leadership.

Leadership Lessons Exercise™

Below you will find ten leadership reflection questions.

Read each question slowly. Then pause.

Resist the urge to answer immediately. The first response is often the most rehearsed. *The value of this exercise comes from giving yourself enough space to move beyond what is obvious and toward what is true.*

Before you write, reflect. If needed, take 30 to 60 seconds of silence. Let specific moments, decisions, and interactions come to mind. Choose one. Precision matters more than volume.

Use the space provided to journal your response. Write to think, not to perform. Be concrete. Name the situation, the people involved, what you decided, what you did, and what changed as a result. Avoid generalizations. Specific examples create clarity.

Once you have completed your written response to a question, do not move on immediately. Use the space that follows to develop one actionable idea directly connected to what you wrote.

Your actionable idea should be specific and executable. Someone else should be able to read it and understand exactly what will happen, by when, and how you will know it occurred.

Use the following structure for each actionable idea:

Actionable Idea

- What I will do
- By when
- With whom (if applicable)
- Evidence it happened:

Complete the reflection first. Then define the action. Insight without action remains theoretical. Action without insight produces activity without progress. The combination sharpens direction, focus, and results.

Reflection & Action Idea

Looking back over the past twelve months, with an eye toward what comes next?

1

When you think about the kind of leader you are committed to becoming, which moment from the past year best reflects that direction, and what does it tell you about the choices you want to repeat going forward?

 **ACTIONABLE IDEA 1:**

2

What understanding or capability did you develop this year that you want to rely on more deliberately in the year ahead?

 **ACTIONABLE IDEA 2:**

3

When leadership felt effective this year, what were you doing that you want to practice more consistently in the future?

 **ACTIONABLE IDEA 3:**

4

When leadership felt strained or ineffective, what did that reveal about the limits, patterns, or blind spots you want to address next?

 **ACTIONABLE IDEA 4:**

5

What assumption, belief, or habit did you let go of this year, and what new way of thinking or leading do you want to reinforce instead?



ACTIONABLE IDEA 5:

6

What contribution or behavior are you most proud of that may not be captured in metrics, and how do you want to protect or expand that impact going forward?



ACTIONABLE IDEA 6:

7

If you were given the opportunity to make one similar decision again in the coming year, what would you do differently, and what principle would guide that choice?

 **ACTIONABLE IDEA 7:**

8

What aspect of leadership demanded the most from you this year, and what capability do you need to strengthen so you can meet that demand with greater capacity next time?

 **ACTIONABLE IDEA 8:**

9

As you look ahead, what do you most appreciate about your team today, and how will you lead to build on that strength rather than take it for granted?

 **ACTIONABLE IDEA 9:**

10

If you had to choose one client situation from the past year as a case study for your business or team, which would it be, and how would that example shape the way your team creates value going forward?

 **ACTIONABLE IDEA 10:**

Notes:

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