



LEADERSHIP TOOL

# ClientWise Team Tip Leadership Guide

*A Weekly Discipline for High-Performing  
Advisory Teams*



— Est. 2006 —

Name:

Date:

## About ClientWise LLC

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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**.

## OVERVIEW

# What Is the Team Tip Guide?

High-performing advisory teams build momentum through consistent conversations about their collaboration methods and how they work together. The Team Tip Leadership Guide provides a simple framework that leaders can use during weekly meetings to reinforce culture, improve collaboration, and enhance the client experience.

### **Reinforce Culture**

Each week, the team leader presents a Team Tip and facilitates a brief discussion. Team members will often rotate this responsibility weekly, monthly, or quarterly.

### **Improve Collaboration**

Over time, these conversations help teams improve decision-making, build trust, and align around common goals.

### **Enhance Client Experience**

The guide is designed to fit into a 10 to 12-minute segment of a weekly team meeting.

**The goal is simple: Create a rhythm of reflection that strengthens the way the team works together.**

## CADENCE & FLEXIBILITY

# Making It Work for Your Team

The Team Tip framework is organized as a weekly rhythm. In practice, many high-performing advisory teams choose a more flexible cadence. The reality is that great teams are deeply engaged in client work, business development, and leadership responsibilities.

### Weekly Review

For some teams, the value comes from simply reviewing the tip and discussing the coaching question for a few minutes. The actionable idea may be useful — or it may not be the right moment. That decision belongs to the team.

### Monthly Deep Dive

Many teams choose to review the tips individually each week and then bring forward a favorite tip for deeper discussion once per month — dedicating the first Tuesday of each month to the most relevant tip.

### Consistent Reflection

The purpose of the exercise is to encourage consistent reflection and learning about how the team operates. When teams regularly step back and think about how they collaborate, the impact compounds over time.

### The Objective

The goal is simple: create a rhythm of reflection that strengthens the way the team works together.

# The 4-Step Weekly Meeting

## 1

### Introduce the Theme

2 min



The leader briefly introduces the weekly theme and reads the Team Tip.

**Purpose:**

- Reinforce the mindset behind the topic
- Connect it to the team's work
- Set the tone for reflection

**Example:**

*"Today's Team Tip focuses on positive intent. High-performing teams assume that colleagues are acting in the service of the firm, the client, and each other. That mindset shapes how we collaborate, how we solve problems, and how we respond under pressure."*

## 2

### Discuss the Coaching Question

5 min



The leader poses the coaching question and invites team members to share their perspective.

**Purpose:**

- Surface insight
- Strengthen shared understanding
- Invite diverse perspectives

**Guidelines:**

- Invite several voices
- Allow reflection time
- Keep the discussion constructive and future-focused

### 3

#### Agree on the Actionable Idea

5 min



The leader presents the actionable idea and asks the team to agree on its application for the upcoming week or month.

**Purpose:**

- Translate ideas into behavior
- Reinforce accountability
- Create small improvements over time

**Example:**

*“Over the next week, let’s intentionally connect each team role to the client outcome we identified. During our next meeting, we will share what we learned.”*

### 4

#### Close with One Commitment

2 min



Each participant states one commitment they will apply from the discussion.

**Purpose:**

- Reinforce ownership
- Strengthen accountability
- Build team momentum

**Guidelines:**

- Invite several voices
- Allow reflection time
- Keep the discussion constructive and future-focused

# Team Tip Leader Checklist

## 1 Introduce the Theme

2 min

- Read the Team Tip aloud**  
*Keep it brief — 1-2 sentences max*
- Connect the theme to the team's current work**  
*Why does this topic matter right now?*
- Set the tone for reflection — invite curiosity**

## 2 Discuss the Coaching Question

5 min

- Pose the coaching question clearly**  
*Read it word-for-word from the Team Tip*
- Invite several voices to respond**  
*Don't let one person dominate*
- Allow brief reflection time before responses**  
*A 10-second pause is okay*
- Keep discussion constructive and future-focused**

## 3 Agree on the Actionable Idea

5 min

- Present the actionable idea from the Team Tip**
- Ask: How will we apply this in the next week/month?**  
*Make it specific to your team's context*
- Get verbal agreement or commitment from the team**
- Note any variations or adaptations the team suggests**

## 4 Close with One Commitment

2 min

- Ask each person to state one commitment**  
*Go around the room or call on individuals*
- Allow reflection time**
- Close on a positive, forward-looking note**

## CLOSING THOUGHTS

# Small Conversations, Big Impact

Leadership within a high-performing advisory team rarely comes from one large initiative. It emerges through small, thoughtful conversations that occur consistently over time. The Team Tip framework creates space for those conversations.

When teams regularly pause to reflect on how they collaborate, make decisions, serve clients, and support one another, the quality of the team improves. These discussions strengthen trust, sharpen judgment, and reinforce the habits that allow a team to grow beyond the capacity of any single individual. Over time, that discipline helps transform a collection of talented professionals into a true advisory enterprise.

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## Connect with ClientWise

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*Read our blog:*

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