2026 TEAM TIPS



FOR HIGH PERFORMING FINANCIAL ADVISORY TEAMS

Tips #92- #104

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**.

POWERFUL TIPS to strengthen your team's performance and cohesion

Welcome to this collection of twelve powerful weekly tips, each designed to strengthen your team's performance and cohesion. Every tip includes a concise insight, an actionable idea, and a coaching question to help spark meaningful dialogue and reflection. As you explore this guide, we encourage you to evaluate each tip through the lens of your own team. Which ones resonate most with where you are today—and where you want to go? Use this resource to identify the strategies that align with your team's goals, and consider how to incorporate them into your next quarter's plan to drive growth, alignment, and momentum.

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Theme

Confidence in Decisions

THE TIP

Better decisions come from reflection and repetition.

ACTIONABLE IDEA

Review one recent decision and capture what worked and what needs improvement.

COACHING QUESTION

How can we strengthen the quality of our decisions over time?

Notes:



Theme

Expand Your Ecosystem

THE TIP

Clients benefit when professionals collaborate.

ACTIONABLE IDEA

Introduce one external professional into a client conversation this quarter.

COACHING QUESTION

How can stronger collaboration with other professionals improve client outcomes?

Notes:

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Theme

Clients Validate the Work

THE TIP

Client feedback reveals the truth about performance.

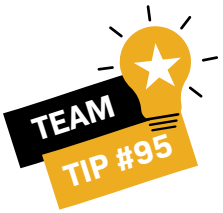
Notes:

ACTIONABLE IDEA

Ask one client for direct feedback on your service experience this month.

COACHING QUESTION

What can we learn from our clients that would improve how we serve them?



Theme

Leadership Must Scale

THE TIP

A growing business requires more leaders, not more effort from one person.

Notes:

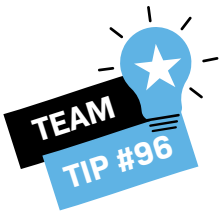
ACTIONABLE IDEA

Assign leadership of one initiative to a rising team member this quarter.

COACHING QUESTION

How can we expand leadership capacity across the team?

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Theme

Operations Enable Growth

THE TIP

Strong operations create consistency and capacity.

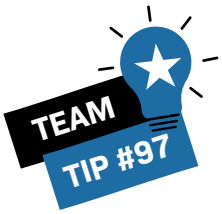
Notes:

ACTIONABLE IDEA

Improve one operational process that impacts client experience this month.

COACHING QUESTION

What operational improvements would create more consistency and scale?



Theme

Reflect and Build

THE TIP

Progress accelerates when teams pause and assess.

Notes:

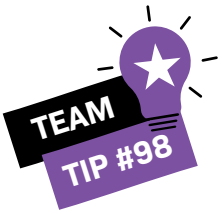
ACTIONABLE IDEA

Identify three areas of improvement from the past quarter and act on one immediately.

COACHING QUESTION

What lessons from our growth can we apply moving forward?

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Theme

Develop the Next Generation

THE TIP

Future success depends on who is being developed today.

ACTIONABLE IDEA

Assign stretch responsibilities to emerging leaders and review progress monthly.

COACHING QUESTION

How can we accelerate the development of future leaders on this team?

Notes:



Theme

Resilience Is Built

THE TIP

Teams grow stronger through challenge when they learn from it.

ACTIONABLE IDEA

Document lessons from one recent challenge and apply them to current work.

COACHING QUESTION

How can we turn challenges into opportunities for growth and improvement?

Notes:

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Theme

Recognition Strengthens Culture

THE TIP

Culture is reinforced by what is acknowledged.

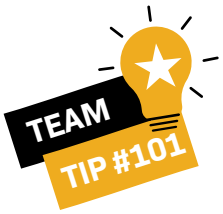
ACTIONABLE IDEA

Have each team member recognize another team member in your next meeting.

COACHING QUESTION

How can recognition reinforce the behaviors that matter most?

Notes:



Theme

Outcomes Define Value

THE TIP

Clients judge value based on results, not activity.

ACTIONABLE IDEA

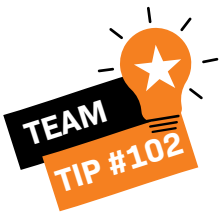
Review one client relationship and document the outcomes delivered.

COACHING QUESTION

What outcomes best represent the value we deliver to clients?

Notes:

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Theme

Capture What Matters

THE TIP

Lessons are lost if they are not documented.

Notes:

ACTIONABLE IDEA

Write down the three most valuable lessons learned this year and share them.

COACHING QUESTION

What lessons should we carry forward to improve next year?



Theme

Celebrate Progress

THE TIP

Progress deserves recognition, not just final outcomes.

Notes:

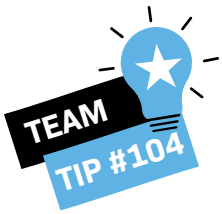
ACTIONABLE IDEA

Hold a team session to recognize milestones and progress achieved.

COACHING QUESTION

How can we better recognize progress as it happens?

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Theme

Commit to the Future

THE TIP

Clarity about the future drives present-day action.

Notes:

ACTIONABLE IDEA

Define three priorities for the next year and assign ownership for each.

COACHING QUESTION

What opportunities ahead are most worth pursuing as a team?

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