

2026
TEAM
TIPS



FOR HIGH PERFORMING
FINANCIAL ADVISORY TEAMS

Tips #65- #76



— 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**.

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

POWERFUL TIPS to strengthen your team's performance and cohesion

Welcome to this collection of fifteen 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.



Theme
Culture Is Built Daily

 **THE TIP**

Culture shows up in what the team consistently does, not what it says.

Notes:

 **ACTIONABLE IDEA**

Select one behavior that reflects your culture and reinforce it in every meeting for 30 days.

 **COACHING QUESTION**

What daily behaviors would define the culture we are committed to building?



Theme
Remote Teams Require Design

 **THE TIP**

Connection requires structure in a distributed team.

Notes:

 **ACTIONABLE IDEA**

Assign remote team members to lead key segments of meetings for the next four weeks.

 **COACHING QUESTION**

How can we create a more connected and engaged experience for every team member?



Theme Accountability Is Visible



Teams trust what they see being followed through.



Track commitments from each meeting and review completion rates at the start of the next meeting.



What level of visible accountability would strengthen trust across the team?

Notes:



Theme Collaboration Improves Outcomes



Better solutions come from combining different perspectives.

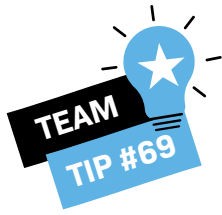


Pair two team members from different roles to improve one client process within 30 days.



Where could deeper collaboration produce a better outcome for our clients?

Notes:



Theme
Solve Root Problems

THE TIP

Fixing symptoms guarantees the problem returns.

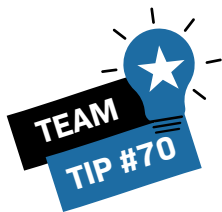
ACTIONABLE IDEA

Identify one recurring issue and eliminate the root cause within 30 days.

COACHING QUESTION

What problem, if solved at the root, would remove friction across the team?

Notes:



Theme
Decision Roles Must Be Clear

THE TIP

Confusion about who decides slows everything down.

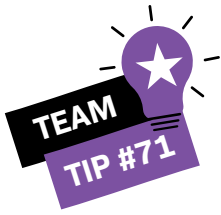
ACTIONABLE IDEA

Define decision, recommendation, and execution roles for one upcoming initiative.

COACHING QUESTION

How would clearer decision roles improve our speed and confidence in execution?

Notes:



Theme
Incentives Shape Behavior

 **THE TIP**

People do what they are rewarded to do.

 **ACTIONABLE IDEA**

Review current incentives and adjust one element to reinforce team-based outcomes this quarter.

 **COACHING QUESTION**

What changes in incentives would reinforce the behaviors we want more of?

Notes:



Theme
Develop Talent with Intent

 **THE TIP**

Talent does not develop on its own.

 **ACTIONABLE IDEA**

Each team member selects one skill tied to firm priorities and reports progress monthly.

 **COACHING QUESTION**

What capabilities, if developed, would elevate our performance over the next year?

Notes:



Theme

Development Plans Must Be Active



THE TIP

A plan only matters if it is used and updated.



ACTIONABLE IDEA

Review and update each team member's development plan this quarter with clear next steps.



COACHING QUESTION

How can development planning become a more active driver of growth?

Notes:



Theme

Career Paths Create Retention



THE TIP

People stay where they can see a future.



ACTIONABLE IDEA

Define the next role or responsibility for each team member and discuss it within 30 days.



COACHING QUESTION

What future opportunities can we create for each team member to grow into?

Notes:



Theme Training Builds Depth



A strong team shares knowledge, not hoards it.



Hold one internal training session this month led by a team member.



What knowledge, if shared, would strengthen the entire team?

Notes:



Theme Meetings Must Produce Outcomes



A meeting that does not drive action is a missed opportunity.



Structure every meeting with clear decisions, owners, and next actions.



How can our meetings consistently produce decisions and forward momentum?

Notes:

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