



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.





Team Tip

Start the year strong by reflecting on last year's lessons and setting intentions for the year ahead

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Actionable Idea

In your next meeting, dedicate 10 minutes for a quick team retrospective:

- 1. Ask each team member to share one success from 2024.
- 2. Follow with one thing they believe the team could improve in 2025.
- 3. Write down common themes and prioritize one actionable takeaway.



Coaching Question

What's one insight from last year that we can immediately use to make 2025 our best year yet?



Notes:



Team Tip

Set clear, measurable goals that align with the team's vision for the year ahead



Actionable Idea

Collaboratively review each team member's specific objectives and key results (OKRs) to ensure alignment with the overall team goals. Highlight opportunities for growth and contribution.



Coaching Question

How energized and committed does each team member feel about connecting their personal objectives and key results to the team's over arching vision and goals for this year?











Foster a culture of continuous learning and development



Actionable Idea

Notes:

Set quarterly learning objectives for each team member, such as mastering a new tax strategy, enhancing CRM efficiency, or enrolling in a certification in business exit planning to better serve business owner clients.



Coaching Question

What specific steps can our team take to incorporate continuous learning into our daily routine, and how can each of us contribute to fostering a culture that prioritizes and celebrates learning?





Team Tip

Strengthen communication channels within your team to foster clarity, trust, and collaboration



Actionable Idea

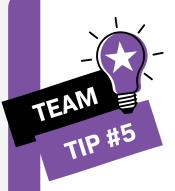
Notes:

Conduct a team survey or hold a meeting to identify specific communication pain points. Based on feedback, introduce or optimize a tool (e.g., Slack, Microsoft Teams) or establish a protocol (e.g., daily stand-ups, weekly check-ins) tailored to your team's needs. Clearly define expectations for tool usage and response times to avoid confusion.



Coaching Question

What specific communication challenges does our team face? How can we address these challenges to enhance understanding, reduce delays, and improve collaboration across all team members?



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Team Tip

Foster an innovative culture: Dedicate time to creative exploration and bold ideas

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Actionable Idea

Host a biweekly "Innovation Hour" where team members pitch creative solutions or improvements to current projects. Include an interactive element,



Coaching Question

What bold, innovative idea would positively impact our team or clients most—and how can we turn it into action?

such as voting for the best idea to implement within a set timeline.



Notes:



Team Tip

Foster a Growth Mindset in Every Role of your High Performing Team

Run a strategic Opportunity Audit. Generate a report identifying all



Actionable Idea

potential areas to deepen client relationships—unrealized planning needs, additional assets to manage, or untapped service opportunities. Tag these in your CRM and assign follow-ups so every team member

drives meaningful growth.

Coaching Question



How will you cultivate a culture of proactive growth in which every team member, regardless of role, contributes to deepening client relationships and expanding opportunities?

B <u>clientwise.com/blog</u>







Strengthen team cohesion through intentional trust-building

Actionable Idea

Implement a "Trust & Transparency Session" during a team meeting. Each team member answers two key prompts:

- 1. "<u>One</u> thing I depend on you for is..." (Encourages appreciation and recognition of each other's strengths.)
- 2. "<u>One</u> way I believe we can improve our collaboration is..." (Creates space for constructive feedback and trust-building.)

Rotate team pairings biweekly to build relationships, dialogue and trust.



Coaching Question

What is one small action we can each take to reinforce trust and reliability within our team?



Notes:



Team Tip

Combine team-building & client engagement events to simultaneously strengthen your internal culture and client relationships



Actionable Idea

Partner with the Red Cross to host a CPR and AED training event.

- 1. Offer clients the opportunity to participate alongside your team.
- 2. If a client or team member cannot attend, donate the registration fee to their favorite charity as a goodwill gesture.
- 3. Promote the event as a shared learning and community impact opportunity, enhancing both team morale and client engagement.



Coaching Question

How can your firm creatively integrate team-building efforts with client outreach to enhance both internal relationships and client loyalty?





Team Tip

Cultivate resilience as a core strength to embrace change and drive progress

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Actionable Idea

Notes:

At your next team meeting, ask each team member to reflect on a time when the team faced adversity. Have them share what worked well and what we should keep doing. What didn't work well? What did we learn? And what could we do differently next time?



Coaching Question

How can we actively strengthen our resilience and transform future changes into opportunities for success?



Notes:



Team Tip

Strengthen problem-solving & decisionmaking skills by leveraging team strengths



Actionable Idea

Identify key issues, opportunities, and decisions to be made at your next monthly team meeting. Vote on the top 2-3 priorities and address them as a team, leveraging your diverse strengths to develop solutions that align with your goals. Assign action steps and plan to follow up next month.

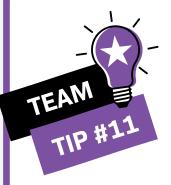


Coaching Question

How can we leverage each other's strengths better to solve complex problems more effectively?









Team Tip

No More Guesswork! Elevate accountability by making expectations and responsibilities crystal clear

Actionable Idea

Turn ambiguity into action! Each team member reviews and refines their responsibilities, then shares for team clarity.



Coaching Question

Where do we need more clarity to stay accountable?



Notes:



Team Tip

Great teams grow by lifting each other up and learning together

Challenge yourself to provide two pieces of feedback—one that lifts a teammate (recognizing something they do well) and one that provides learning for their growth (a constructive suggestion to help them improve).



Actionable Idea

Share your "Lift & Learn" feedback in a quick huddle, a written note, or a casual conversation. Keep it specific, supportive, and forward-focused.

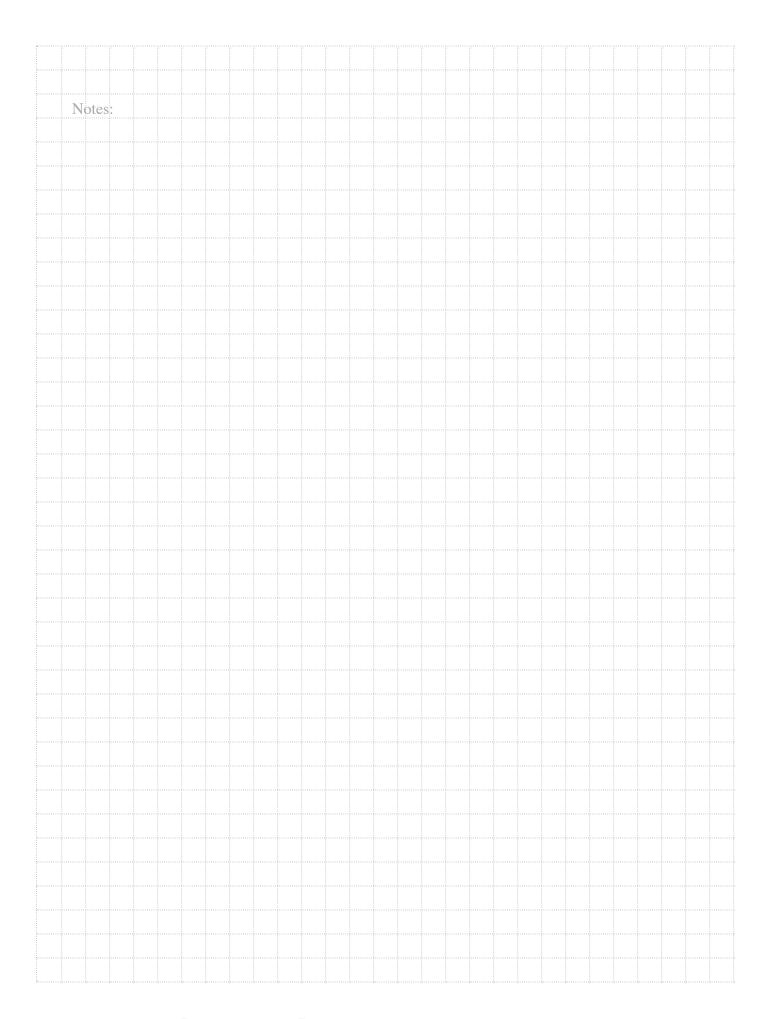


Coaching Question

What's one piece of feedback—positive or constructive—that could strengthen a teammate's work this week?

Actionable Ideas for Our Team

Actionable Idea	Who's Involved
1	
2	
3	
4	



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