

Build Your Dream Team

Mindset Consulting is pleased to offer you a comprehensive best practices program designed to help you **meaningfully manage and lead your team**, giving you the confidence that you are taking great care of the individuals who have the ability to help you achieve your ideal advisory practice.

Although our program covers many core leadership and management practices, they are easily defined as the **4 Pillars of Success**. Each of these pillars play a critical role in your ongoing success as the visionary, leader and manager of the team. As With all of our solutions, we will walk you through each best practice in a sequential and manageable manner. In the process, you will create predictability, structure, fairness, and reduce stress in an area that can be rewarding, but is also often full of uncertainty and challenges.

This program is best suited for **Financial Advisors and Business Managers** who want to implement well-defined best practices to effectively lead, manage and motivate their team.

Build Your Dream Team

The central image shows a woman from behind, wearing a black short-sleeved top and light grey trousers. She is standing in what appears to be an office with large windows overlooking a cityscape. Four white rectangular boxes are overlaid on the image, each containing text and a 'Click here to learn more' button.

- Pillar 1**
Create Synergy & Success
[Click here to learn more](#)
- Pillar 2**
Systematize Your Practice
[Click here to learn more](#)
- Pillar 3**
Purposeful Leadership
[Click here to learn more](#)
- Pillar 4**
Culture of Excellence
[Click here to learn more](#)

The Dream Team Approach

This program is best suited for Financial Advisors and Business Managers who want to implement well-defined best practices to effectively lead, manage and motivate their team.

This includes those wanting to achieve any one or more of the following:

- Adopt an overall proactive approach to team management to create predictability, structure, and transparency
- Implement a series of well-defined best practices to manage all aspects of the team structure, vision and communication to improve team performance and reduce stress
- Define protocol for information sharing, staying organized, and connecting as a team
- Provide a clear line of site related to your vision and goals
- Define expectations and accountabilities for each member of the team as it relates to your vision
- Promote professional growth and compensation alignment to keep great people
- Strategically plan for New Hires and team expansion to support your growth and future transition or succession plans
- Inspire your team through a variety of leadership activities that demonstrates their importance
- Develop a turn-key procedures manual to capture all your intellectual property. This will protect your team from vulnerabilities related to team absences or changes, as well as increase the value of your business
- Create a sustainable business model in preparation for future succession planning

How can it help me?

This program will help you effectively manage and lead your team in a way that is simple, predictable and professional. It will ensure you attract, maintain and grow a talented team of individuals to support you.

It will reduce stress for everyone by defining expectations, creating regular opportunities for communication, developing protocols for sharing information, and implementing a process to keep everyone moving forward with motivation and passion for the vision.

Build Your Dream Team Curriculum

Throughout the entire program, you will have access to everything you need to be successful as a team leader. There are resources for every step of the way including management templates, job descriptions, letters, agendas, graphics, and many other terrific resources to fully energize, motivate and inspire your team.

PILLAR 1: CREATE SYNERGY & SUCCESS

1 Your Advisory Blueprint

- Identify specific roles for each team member to own
- Successfully delegate tasks and activities
- Plan strategically for changes on your team



2 Clearly Define Roles

- Create awareness of expectations for each role
- Provide Job Descriptions to each team member
- Identify opportunities to improve your team

3 New Hires & Team Expansion

- Create awareness of the New Hire opportunity
- Implement professional recruiting & screening
- Make thoughtful New Hire decision

4 New Hire Onboarding

- Be fully prepared to onboard your New Hire
- Reduce stress with a proactive, organized process
- Create high levels of trust with the New Hire

5 New Hire Integration

- Warmly welcome your New Hire
- Provide a detailed Integration Checklist to help your New Hire with their first 90 days
- Set your New Hire up for success

6 Client Transition Process

- Help New Advisors with their Client Transition Process
- Provide them all the tools and resources needed to softly land their clients at the new firm
- Establish high levels of trust with your New Advisor
- Establish high levels of trust with the clients transitioning

7 Client Realignment Process

- Create a positive experience for the clients being realigned
- Feel great about the professional process you are initiating to shift your clients

PILLAR 2: SYSTEMATIZE YOUR PRACTICE

8 Capture Your Intellectual Property

- Increase the value of your business
- Assist with successful realignment of tasks within the team
- Facilitate the training of new or temporary staff



9 Communication Protocol

- Develop specific guidelines for the use of the team shared drive
- Define the master folders in your team shared drive along with the core sub-folders
- Provide instruction for consistent naming of files

10 Full CRM Integration

- Use your CRM as the centralized system to view all things in the past, present and future as it relates to the complete client relationship
- Use workflows and action plans to automate your servicing and onboarding
- Use tasks, notes and activities to keep everyone on your team fully connected

PILLAR 3: PURPOSEFUL LEADERSHIP

11 Annual Strategic Planning Session

- Build an Annual Strategic Plan that serves as a snapshot of what you want to achieve and how you will achieve it
- Ensure your team is fully aligned and engaged in the strategic vision of your practice
- Develop a greater sense of team unity



12 Quarterly Strategic Meeting

- Establish a simple method of accountability on a quarterly basis with your team members
- Develop a greater sense of team unity
- Demonstrate your predictable, consistent, and professional leadership

13 Weekly Team Meeting

- Allow a point of consistent accessibility to the Advisor(s) so the team can have questions answered, and can forge ahead with their many client-specific tasks
- Maximize this team time together by using a meaningful Agenda
- Adopt a process that keeps everyone connected and moving in the same direction

PILLAR 4: CULTURE OF EXCELLENCE

14 Promote Professional Growth

- Create a culture of continued growth & success
- Implement an approach that ties compensation to performance, achievement, commitment and continued professional growth
- Use an Agenda to cover a range of important topics and discussion with each of your individual team members



15 Align Compensation

- Use a Compensation Summary to convey a range of elements included in the compensation package for each of your individual team members
- Implement compensation approach which rewards tenure, performance, achievement, contributions to the business, and continued professional growth – providing motivation and inspiration
- Create a culture of continued growth and excellence

16 Exceptional Leadership Model

- Provide predictable team and leadership activities that helps your team stay motivated, inspired and on track
- Initiate unexpected activities that show how much you appreciate and value your team as individuals
- Lead your team in a way that empowers them to be their best, both professionally and personally

17 The Road to Leadership Success

- Conduct an Annual Leadership Management Checkup to keep your leadership and team management on track