

Leadership Activities for Everyone

There are several leadership activities which involve and engage the entire team and intended for everyone:

-  Annual Strategic Planning Session
-  Annual Team Dinner/Event
-  Thanksgiving Acknowledgement
-  Quarterly Strategic Meeting
-  Weekly Team Meeting
-  Monthly Advisor Meeting
-  Monthly Operations Meeting

We highly recommend all teams initiate the **Annual Strategic Planning Session**, **Quarterly Strategic Meetings**, and the **Weekly Team Meeting**, previously described in great detail.

Depending on the size and structure of your team, it may also be beneficial to add **Monthly Advisor Meetings** and **Monthly Operational Meetings**. This will allow the respective groups to work on specific items together, in detail, keeping the Weekly Team Meeting more focused on items that everyone can discuss. If you have a Business Manager, Operations Coordinator, or Senior CSA they are often more than capable of running the Monthly Operations Meeting, so your presence is generally not necessary.

Sprinkled on top of these various professional meetings are a couple of team appreciation activities that involve an annual **Team Dinner or Event** and a **Thanksgiving Acknowledgement**. The Team Dinner or Event is sometimes included with the Annual Strategic Planning Session so they can be covered off at the same time. Sometimes, however, they are completely separate, and at another time of year by choice. The Thanksgiving Acknowledgement is the perfect time of year for you to give each of your team members a beautiful handwritten card. The card would include a heartfelt message of your appreciation for their continued efforts, great attitude, and commitment to the advisory practice. You may also want to include a small gift or gift card to a store or service provider you know they would value and appreciate.