# ELITE TEAM

# Retreat

## PROGRAM AGENDA

## BEST PRACTICES WORKSHOP

THE OECHSLI INSTITUTE

The Oechsli Institute | 800-883-6582 | www.oechsli.com

# Elite Team Retreat

Intensive Workshop with Matt Oechsli

## One Day Action-Packed Workshop for Financial Teams

Join us if you're committed to ongoing performance improvement: bringing in more affluent clients, strengthening client loyalty, and sharing best practices with other Elite Financial Teams. We will cover how to:

- ☑ Deliver what affluent investors want
- ☑ Develop rock solid roles and responsibilities
- ☑ Fine tune your high-impact prospecting activities
- ☑ Correct individual and Team performance gaps
- ☑ Focus on big money tasks and delegate the rest
- ☑ And much more!


*The rainmaking process has already resulted in $5.6mm in new assets in two months and $251mm in our pipeline. Any team looking to take their practice to the next level needs to look no farther than The Oechsli Institute.*
*~JPG Group, Portland, Oregon*

*Matt Oechsli has the unique ability to combine hands-on experience from coaching elite teams with statistically significant data from his firm's research on over 1,350 teams.*

BASED ON 4 YEARS OECHSLI INSTITUTE RESEARCH

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## Session 1: The Affluent Opportunity & Strengthening Team Leadership

The Affluent Opportunity for Financial Teams

How your team can capitalize on affluent skepticism and dissatisfaction

- Welcome and Introduction
- Framework of the Event / Ground Rules
- Overview of the Affluent Opportunity; 2009 Affluent Research Projects focused on attracting the affluent, servicing the affluent, and developing affluent loyalty
- Overview of Financial Team Opportunity – Based on 2009 Elite Financial Team Research
- Learn who the affluent trust in the financial world

*Strengthening Your Effectiveness as a Team Leader*

Inspiring and directing team performance at all levels

- Review research findings regarding Elite Team Leaders
- Learn how to transform your Team's business plan into a vision; how to envision your Team's future to effectively inspire performance and accelerate Team development
- Master the formula for developing a 10 second Team value proposition that will be natural for every team member
- The importance of Rainmaking and growth to overall team harmony
- Discussion on managing conflict; best practices
- Team Forming Guidelines – Also great for assessing new team members
- Review of your Team's compensation agreement; making certain that it is both fair and motivating
- How to structure a Team Agreement
- How Team Leaders of Elite Financial Teams focus on the Big Dollar Tasks and delegate the rest
- Breakout discussion - Your biggest challenge as a team leader

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## Session 2: Practice Management Process

*Practice Management Process*

Making certain you have the right people doing the right activities the right way for the right reasons

- Ideal and Minimum client profiles; from a service and Rainmaking perspective
- How to conduct an annual *Net Profit Contribution Analysis*
- The ideal role of a Practice Manager
- Recognizing individual strengths and weaknesses
- How to continually improve your Team's operational efficiency
- How to clarify roles and responsibilities
- Create client service models that maximize efficiency while building serious loyalty
- How to create a bonus structure linked to Rainmaking and support roles that motivates everyone; the compensation challenge
- How to hold an effective Team Meeting
- The power of quarterly and annual off-site retreats
- Breakout discussion: (Groups of 3 to 4)
  Clarify roles and responsibilities

Our 21st Century
Financial Team Model

## Session 3: Business Development & Wealth Management Process

*Business Development Process*

Based on our independent research, Elite Financial Teams master the art of business development - all focused on ideal clients.

- Creating a team business plan and avoid the common planning pitfalls
- Setting annual metrics that stick
- Create a back of envelope business plan for every team member
- Craft process driven internal and external business development engines
- How to make Strategic Networking a team effort
- Cultivating profitable Strategic Referral Alliances as a Team
- How to schedule and hold *Intimate Client Events*
- Business development as a Team commitment
- Learn the DO's and DON'Ts of using a Wealth Management Team brochure and collateral materials
- Breakout discussion - External vs. internal business development

*Wealth Management Process*

Why it takes an Elite Financial Team to service the multi-dimensional aspects of the affluent consumer's financial affairs.

- Review your Team's capabilities in providing comprehensive wealth management
- Leveraging Outside Experts to maximize positioning
- The 10 Commandments – What the affluent want from financial teams and how to position your team to capitalize on this data
- Providing Financial Organization & Comprehensive Financial Planning
- Using a disciplined investment process
- Breakout discussion (groups of 3 to 4) to identify action steps to strengthen Wealth Management Process

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**Session 4: Client Loyalty Process, Assessment Review & Pulling it All Together**

*Client Loyalty Process*

Creating a White Glove / Ritz Carlton service experience

- Learn the 7 Secrets to Affluent Loyalty
- Using a Client Communications Agreement for maximum impact
- How to *surprise & delight* your affluent clients to strengthen loyalty get introductions
- Profile your top affluent clients to build iron clad loyalty
- How to make certain every Team member gathers information for *surprise & delight* opportunities
- The symbiotic relationship between affluent loyalty and business development

*Building an Elite Financial Team - Assessment*

- Overview of 4 years of research on Financial Teams
- The natural stages of Financial Team development; *Forming-Storming-Norming-Performing*
- Review of the 5 components of our Elite Financial Team Model
- Review your Financial Team personal assessment to identify your Team's current stage of development, and identify individual team performance gaps
- Breakout exercise with your team to discuss gaps and developing a prioritized action plan to close three gaps
- Learn how to apply the process of creating a "Critical Team Growth Path" that is complete with action steps for your Financial Team

*Pulling it all Together*

- Define your fixed daily activities as a Team Leader
- Create your iron clad team goal commitment
- Determine how your Team will use the Critical Path Organizer System