



## Building High-Performance Adviser Teams Workshop Agenda

### WORKSHOP AGENDA

Activity/Topic
Introduction
Organizing Teams <ul style="list-style-type: none"> <li>• Different team structures in the industry</li> <li>• Roles and responsibilities within teams</li> </ul>
Managing Team Processes <ul style="list-style-type: none"> <li>• Setting expectations</li> <li>• Assigning accounts</li> <li>• Establishing rewards and recognition, balancing individual and team recognition</li> <li>• Conducting marketing in a team setting</li> </ul>
Tracking Team Performance <ul style="list-style-type: none"> <li>• Sales</li> <li>• Marketing efforts</li> <li>• Client relationships</li> <li>• Activity management</li> </ul>
Launching and Maintaining Teams <ul style="list-style-type: none"> <li>• Facilitating the team launch process</li> <li>• Selecting new team members</li> <li>• Integrating new members onto the team</li> <li>• Transitioning someone off a team</li> <li>• Support: training, resources and tools</li> </ul>
Leading Teams <ul style="list-style-type: none"> <li>• Guiding teams through the stages of team development</li> <li>• Creating a high-performing team environment</li> </ul>
Conclusion
Summary/Wrap-up