

ARE YOU ADDING VALUE TO YOUR TOP PRODUCING TEAMS?

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In an environment that continues to breed uncertainty, more firms are turning their **ATTENTION to RETENTION!** Recruiting remains an ongoing theme, but retaining top teams is increasingly becoming the focal point. Similar to clients, it takes less energy, time, and financial resources to RETAIN existing advisors than it does to ACQUIRE new ones. Corporates around the country send the message to their advisors that they have to COMMUNICATE with their clients, particularly during tough times. They need to show APPRECIATION to their clients; they need to DIFFERENTIATE themselves; essentially, they need to consistently deliver the ULTIMATE CLIENT EXPERIENCE. With that same theme in mind, are you delivering THE ULTIMATE ADVISORY TEAM EXPERIENCE?

Top teams are looking to expand their practice by bringing on additional people resources. The purpose of this is not only to deliver on their increasingly complex wealth management models, but also to design business succession plans. Your top teams are seeking financial allowances from you for professional development, for marketing, to attend industry conferences, to stay on top of their craft, and to hire coaches and consultants to help evolve their practice. Whether they are veteran or younger successful advisors, firms must have a focus on their existing teams and help them achieve the one consistent goal that you both have... TO DRIVE PERFORMANCE.

Whether at the firm level or the advisory team level, both sides of the table want to gain more assets, increase revenues, and become more profitable. ***What does your firm offer to accomplish this mutual goal? What is your firm doing to retain your top teams? What are you doing to differentiate yourselves from other firms? What is on your internal service menu that helps both attract and retain top talent?*** These are tough questions but we hope they are on your leadership agenda!

Again, just like the Advisor-Client relationship, it begins with KNOWLEDGE with the "Know Your Client" rule. How well do you KNOW your top teams? They are all unique with varying strengths and challenges. On some level they all have some "pain," but you cannot offer cookie-cutter consulting and assistance to your superstars! You have to really get to know them professionally and personally; you have to get to the root cause of their particular challenges in order to help them grow and attain that ultimate goal of driving performance. There is no simple one-size-fits-all solution that will create instant gratification at both the firm level and advisor level - it has to be customized to the specific needs of each advisory team.

We realize this clearly creates a challenge for firms from a resource utilization perspective. Depending on your firm, you may have regional, complex, branch or agency managers; you may have internal practice management consultants and trainers; you may have sales development teams or some combination of these elements. Some facet of all of these roles is ultimately tied to helping your advisors and teams drive performance. Do they have the tools in place to make the right diagnosis for your top teams so they can subsequently provide customized solutions that drive performance?

We have created a unique and powerful suite of diagnostics tools - the Performance Insights Process™. Our tools uncover the knowledge that increases awareness of the specific activities or resources that

each of your top teams crave. We can assist you in any phase of true practice management deployment, from administering and debriefing team and business productivity assessments, to providing insights based on our years of experience working in the financial services industry. Besides working directly with teams, we offer train-the-trainer programs and companion facilitator guides to make our proprietary process available in-house. We also license our practice management resources for teams and firms and consult to department leaders.

We're here to improve top teams, not waste their time. Teams that rank in the top 10% of performance for an organization are the heart of profitability. The Performance Insights Process™ is designed to maximize the performance of your cream of the crop players by providing reliable results, consistently delivered.

If you are looking for a unique, results-driven approach that eliminates pain, drives performance, shares best practices, and builds bench strength at your firm, contact us for a demo and consult.

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