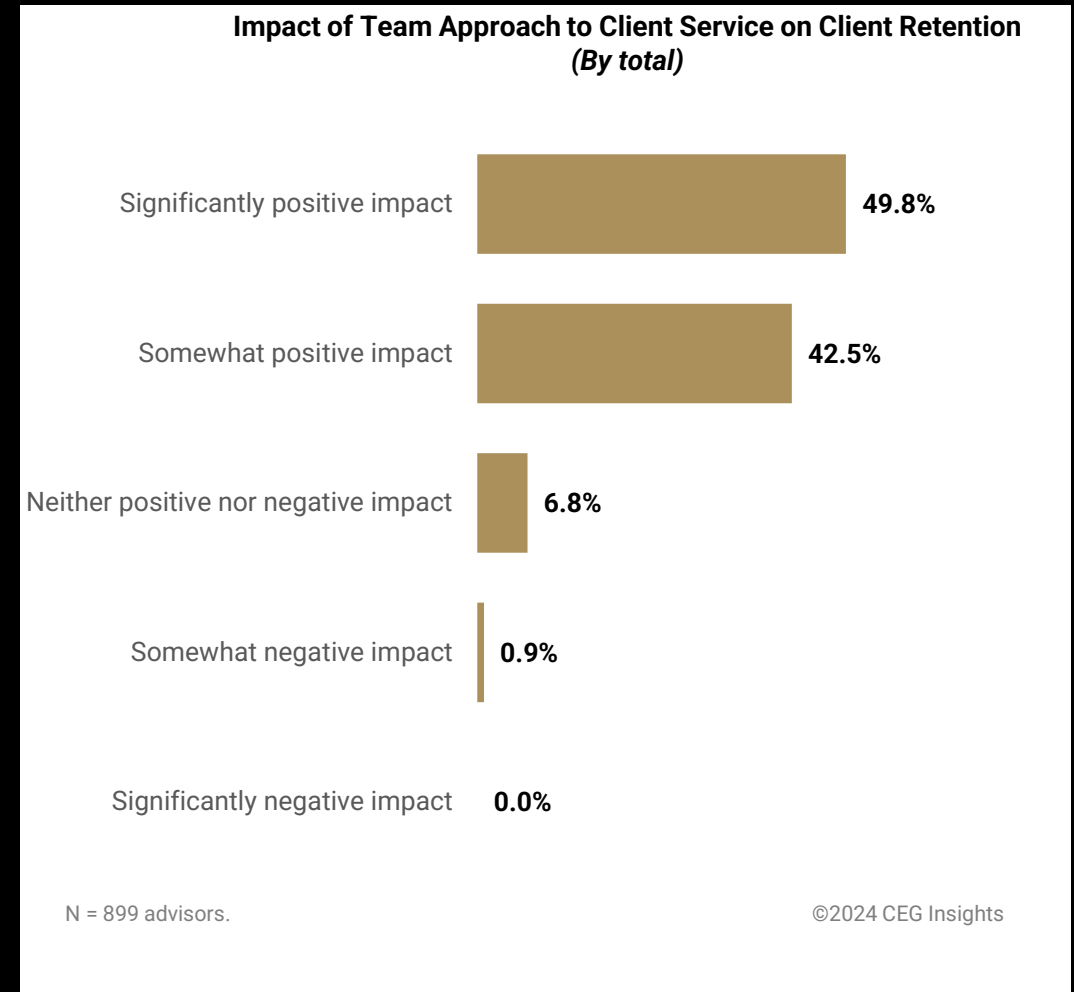


Enhancing Client Retention And Service Through A Team-Based Approach

Nearly Half Of Advisors Report Significant Impact

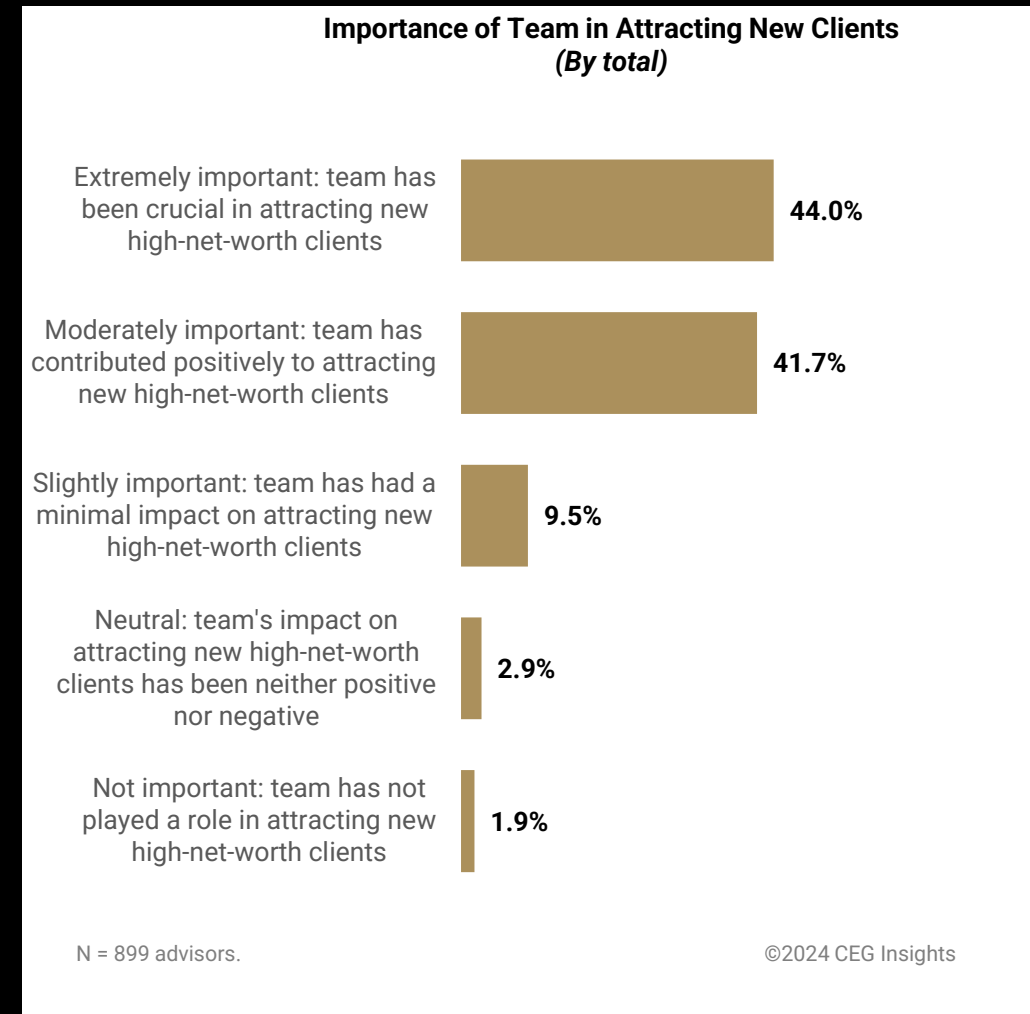
- **Significant Influence:** Nearly 50% indicate a significant impact on client service and retention
- **Positive Impact:** A combined 92.5% of advisors report a positive impact on client retention, with nearly 50% indicating a significant impact and 42.5% reporting a somewhat positive influence.
- **Long-Term Relationships:** Collaboration fosters long-term client relationships and drives success



The Positive Impact Of Teams On Business Development

Over 90% Of Advisors Report Positive Influence

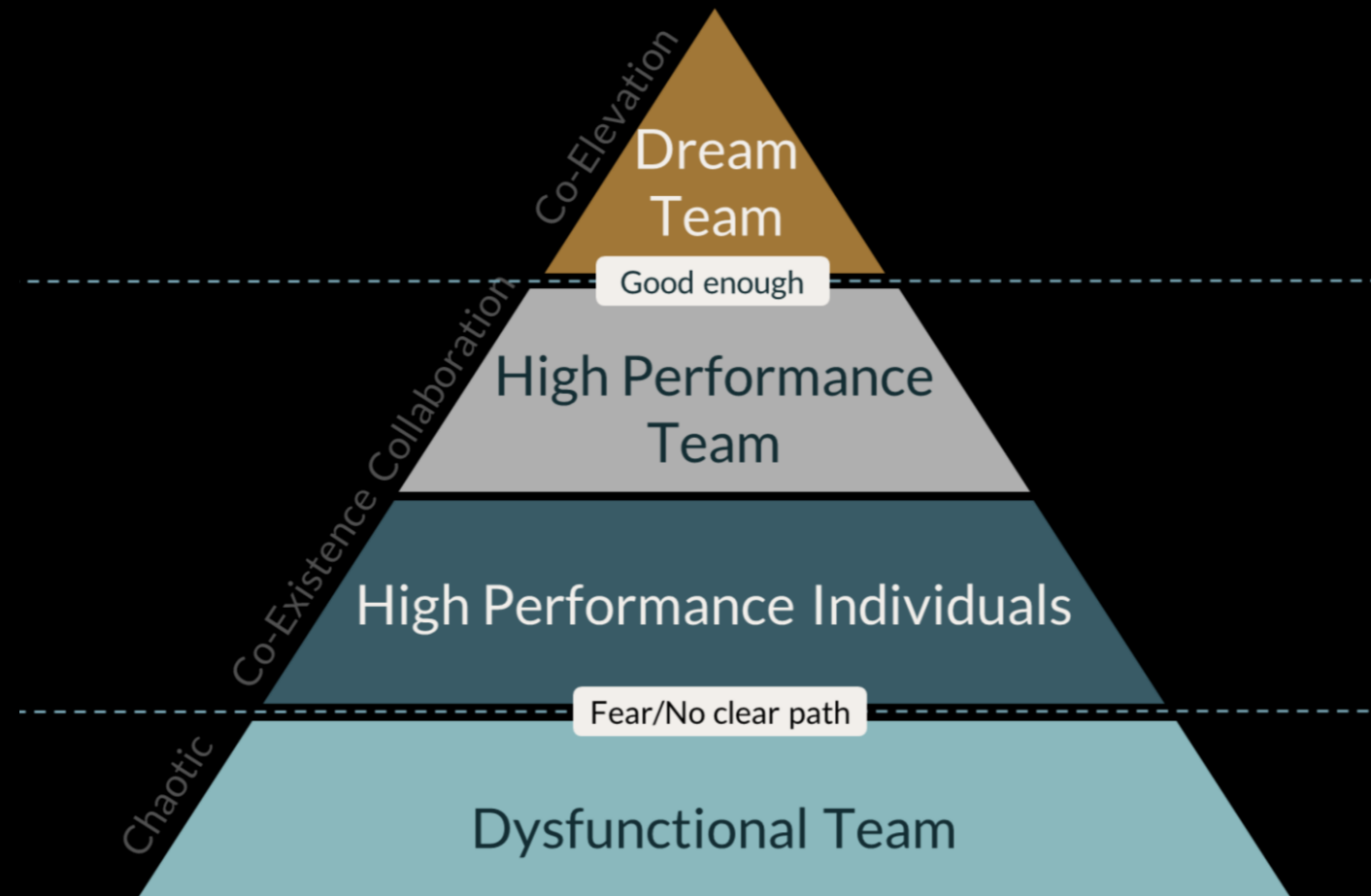
- **Team Vitality:** 44% consider teams crucial for attracting high-net-worth clients
- **Strong Impact:** 85.7% rate teams as extremely or moderately important
- **Near Consensus:** 95.2% find teams at least slightly important for client acquisition



From Dysfunction To Dream Team

Understanding The Evolutionary Stages Of Team Development

The Hierarchy of World-Class Team Performance

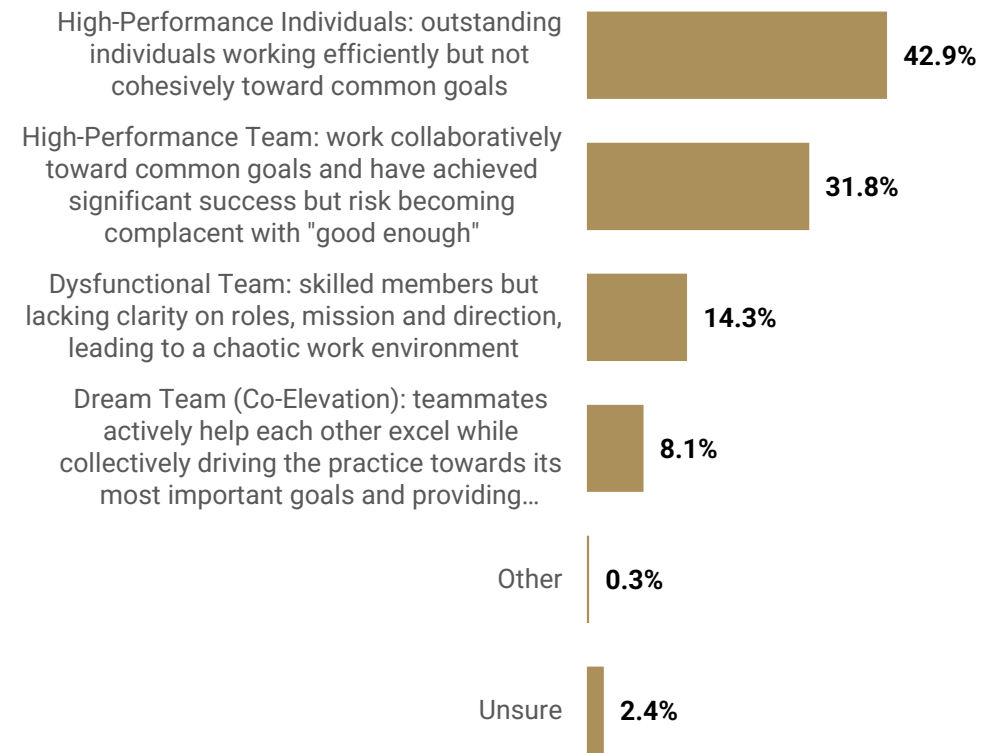


The Untapped Potential Of High-Performing Teams

Rare Cohesion And Prevalent Dysfunction

- **Dream Teams:** Only 8.1% of advisors feel their team has become a true dream team
- **Individual Talent:** 42.9% report having high-performing individuals but lack cohesion
- **Negative Performance:** 42.9% report significant losses in AUM or revenue due to team member behavior

Operational Level of Team Performance
(By total)



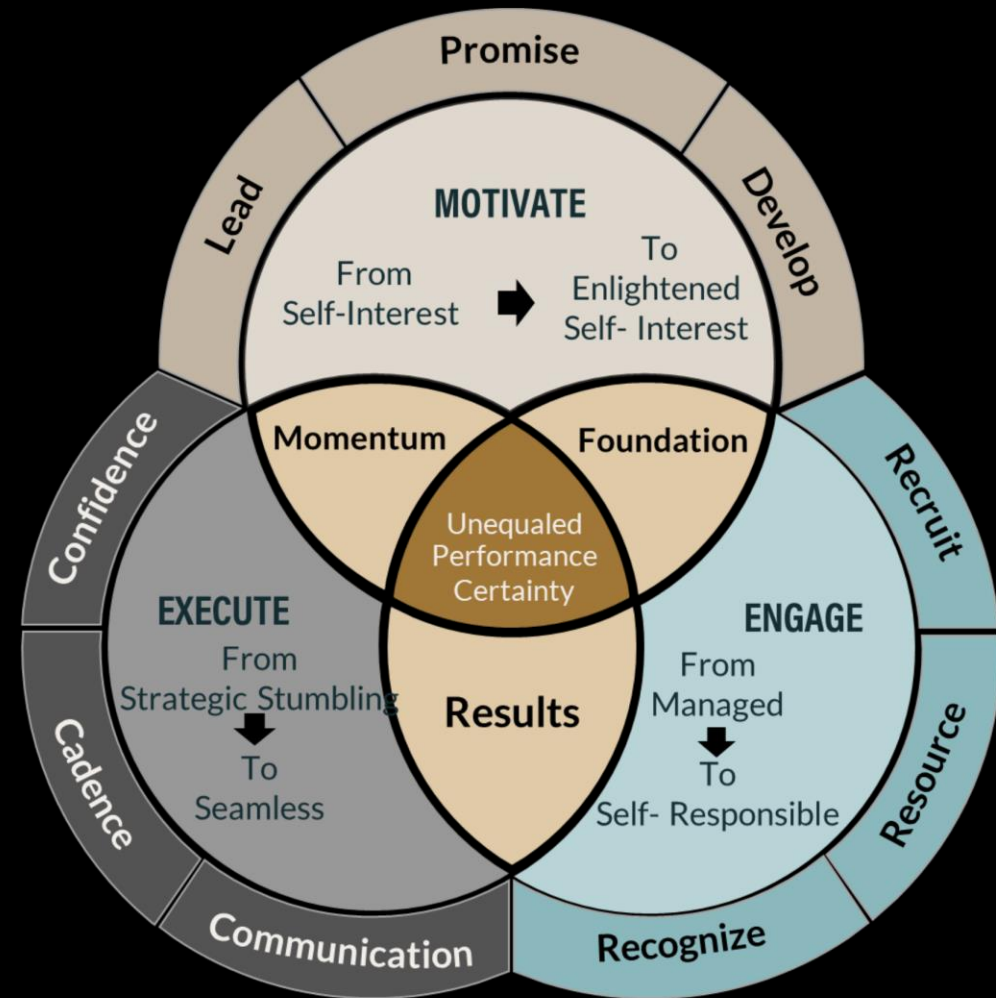
N = 899 advisors.

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Applying The Dream Team Framework

Unlocking Exceptional Performance

- **3 Key Levers:** Motivate, Engage, Execute
- **9 Accelerators:** Driving Team Success
- **Core Goals:** Momentum, Foundation, Results
- **Ultimate Outcome:** Unequaled Performance Certainty



The 9 Accelerators For Dream Teams

Driving Success Through Motivation, Engagement, And Execution

- 1. Lead:** Promote co-elevation culture (Only 8.1% align with shared objectives)
- 2. Promise:** Deliver exceptional client value (90% report positive impact)
- 3. Develop:** Facilitate continuous learning (58% retention strategy)
- 4. Recruit:** Strategically attract talent (82% actively growing teams)
- 5. Resource:** Establish shared values and objectives
- 6. Recognize:** Celebrate contributions (2/3 link bonuses to revenue)
- 7. Confidence:** Equip for effective client service
- 8. Cadence:** Implement performance structures (20%+ turnover rate)
- 9. Communication:** Foster transparent team interactions (31% use a collaborative approach)

"Coming together is a beginning. Keeping together is progress. Working together is success." - Henry Ford.

The Dream Team Effect

Mastering Team Dynamics to Achieve Wealth Management Excellence



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