

# Outcome-Based Team Retreat Agenda

## 1 Year-end & Key Performance Indicators

- » Summary of the firm's successes over the last year with key performance indicators such as net new assets, new relationships and any sort of client satisfaction data you might have.

## 2 12-month Vision

- » Where do you want to see the firm heading? Paint an ideal picture of where the firm will be next year at this time.
- » How do you see roles and responsibilities evolving to better leverage the strengths and preferences of each team member?
- » Within the range of things you can control, how would you like the next 12 months to be different than the last 12?
- » What defines success, and how can the team come together to deliver that?

## 3 Enhance Client Engagement

- » Review with the team your proactive process for client referrals/introductions.
- » How intentional is the team with creating opportunities for referrals/ introductions?
- » What additional steps might be taken to create a client experience that results in "raving fans?"

## 4 Role Alignment

- » Are the firm leader's focusing on primarily nurturing top tier relationships, soliciting new top tier clients, and developing and overseeing execution of the strategic vision? If not, what needs to change?
- » How would you describe the current assignment of tasks within each role? Are there any shifts in responsibility needed?
- » What can be done to ensure the right team members are doing the right work at the right time?

## 5 Initiatives & Key Assignments

- » Identify specific growth initiatives for the next year
  - What key assignments are required to make those a success?
  - Assign next steps to team members
- » Operational or Process Improvement Initiatives
  - What structure needs to be created to accomplish the growth goals?
  - Assign next steps to team members

## 6 Key Performance Indicators (KPI)

- » Which KPI's will be measured?
- » How and when will they be tracked and reported?

## 7 Open Discussion

- » Additional time for any issues that are top of mind for team members.



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