

Team Strengths Assessment & Implementation Priorities

Team Strengths Alignment

Identify which team members have natural strengths or interests that align with each directorship:

Team Member	Current Role	Apparent Strengths	Potential Directorship Alignment # 1	Potential Directorship Alignment # 2	Notes

Implementation Priorities

Based on the assessment, identify your top 5 implementation priorities across all directorships:

Implementation Timeline

Estimate implementation timing for priority areas:

Priority Area	90-Day Action Items	6-Month Milestones	12-Month Goals
1			
2			
3			
4			
5			

Date Completed: _____

Completed By: _____

Next Review Date: _____

Client Call Script: Introducing the First-Class Service Model

Purpose

This script provides a framework for introducing existing clients to the Supernova service model during in-person or virtual meetings. The approach uses the first-class air travel analogy to help clients understand the enhanced experience.

Preparation for the meeting

Review the client's current situation and relationship history

Have a client folder prepared if possible (to be discussed in Session 4)

Schedule adequate time (30-45 minutes) for this discussion

Introduction Script

Opening

"Thank you for taking the time to meet with me today. I'm excited to share some significant enhancements we're making to our service model that will directly benefit you."

Explain the Catalyst

"Our team has engaged an external consultant to help us elevate our client experience. After careful consideration, we're implementing several refinements and structural modifications that I'm enthusiastic about."

First-Class Analogy

"As you may know, our practice has always maintained a relatively limited client roster. I'd like to explain how we're enhancing this approach starting [implementation date]."

[Pause]

"Have you ever experienced first-class air travel?"

If yes: "What aspects of that experience did you find most valuable?" [Listen and acknowledge]

If no: "First-class passengers enjoy priority boarding, guaranteed storage for carry-on items, premium dining options, spacious seating, enhanced comfort amenities, and attentive service throughout their journey."

[Continue]

"Imagine that my team has acquired an aircraft and removed all existing seating, installing exclusively first-class accommodations throughout the cabin. This represents our approach to practice management. Every client will receive concierge-level service from our team, which necessitates maintaining a limited client roster."

The Three Service Elements

"This enhanced service model includes three key elements:

- 1. Proactive Communication** - We'll schedule 12 contacts throughout the year, including four portfolio reviews and two in-person meetings. This structure ensures we stay closely connected to your evolving needs and circumstances.
- 2. Comprehensive Planning** - Every client will receive multigenerational planning with thorough implementation. This allows us to understand 'the story behind the numbers' and address your deepest priorities.
- 3. Responsive Service** - We're implementing a rapid response system with one-hour acknowledgment and 24-hour resolution guarantees. When questions or concerns arise, you'll receive prompt attention."

Addressing Potential Questions

"Why do we need scheduled appointments if things are working well currently?" "Scheduled appointments demonstrate respect for both of our time and eliminate inefficient communication patterns. They ensure substantive conversations with prepared agendas rather than interruptions and allow for proper documentation of decisions."

"Is monthly contact necessary?" "Significant financial events often occur unexpectedly within brief timeframes. Monthly contact ensures awareness of developments before they impact financial outcomes. I've had several clients experience major financial events between quarterly reviews that benefited from more frequent contact."

"My schedule is too busy for monthly appointments." "The structured appointment system actually accommodates busy executives more effectively than unscheduled interactions. The meetings are focused and efficient, and we can adapt the timing to your schedule. Many of my busiest clients find this approach saves them time overall."

Confirmation

"What are your thoughts about this enhanced approach? Do you have any questions or concerns?"

[Listen carefully and address any specific concerns]

Next Steps

"Our Client Service Associate, [name], will be contacting you to arrange your regularly scheduled monthly consultations. We'll provide a documentation folder for your records and monthly agendas before each meeting.

Following each appointment, we'll send an executive summary to document our discussions and next steps. This ensures we're always aligned on your priorities and progress."

Closing

"I'm excited about how this enhanced service approach will benefit you. My goal is to provide the kind of comprehensive, attentive experience that gives you complete confidence in your financial future. Thank you for being one of our valued clients."