



Results-Driven Solutions August 2016 Newsletter

by Sarah E. Dale and Krista S. Sheets

The ultimate success of a financial services practice means maximizing
ROP=Return on People™



[\[download\]](#)



Here is the latest edition of our newsletter for financial professionals, focusing on the importance of Support Roles. If you missed our last newsletter, [What is Your ROD...Return on Decisions? 5 Key Practice Management Areas to Assess](#), you can find it on our [website](#). Please feel free to share the content of this newsletter with anyone who can benefit from it. And, if there is anything that you would like for us to include in future newsletters, let us know! We base our newsletter content on your specific needs and what we hear from the field. To submit a topic that you'd like to see in upcoming newsletters, please email us at info@ParagonResources.com or info@knownobounds.net.

“People don’t want to communicate with an organization or a computer. They want to talk to a real, live, responsive, responsible person who will listen and help them get satisfaction.”

~ *THEO MICHELSON*

Essential Steps for Client Service Associates and Sales Assistants

It has been too long since we focused our newsletter on the client service associate or sales assistant role. As many of you know, we spend much of our time helping advisors build high-performance teams, and the role of the CSA or SA is critical to the long-term success of advisory practices. We have witnessed how often they are underutilized and how they are eager to do more for the business. Typically, there are less training opportunities for support members, so it is important to encourage your CSAs or SAs to take advantage of any and all professional development programs that will lead them to being more efficient and effective on your team. Empower them where appropriate and ensure that you are maximizing their time and talent.

Please pass this on to your CSAs and SAs to help capitalize on their vital role in service driving sales.

Become Self-aware

- What are your strengths? Define and strengthen those talents.
- What are your challenges? Where can you develop?
- What are your motivators? How do you define success?
- Understand where your time is spent. Multi-tasking only works when there is organization and prioritization.
- Consider using the [MapMyStrengths.com](https://www.mapmystrengths.com) [DISC and Motivators Assessments](#) for objective analysis of who you are.

Listen, Observe, and Question

- We learn when we listen. Listen to your peers, successful producers, and leaders. Avoid interrupting even when you are dying to say something. Write it down and wait for the appropriate moment to give your insight.
- Learn from the expertise of those around you by asking questions...soak up their knowledge!
- Watch all of the leaders and learn what attributes you want to incorporate into your style.

Strengthen Relationships

- It's all about relationships – build and develop them, but don't force them. You will 'click' with some co-workers and become friends outside of the office, but with others, that 'click' will never occur, so you have to find ways to work with them professionally and productively.
- You have to listen, care, and then act. Open communication is a must to building strong relationships with your advisor and the client base.
- Find a mentor to support your growth or start an assistant advisory forum to share ideas and challenges with one another. There are always better ways of doing things that will lead to increased business, better service, or improved efficiencies.

Develop Your Work Ethic

- Be accountable for all that you do. Don't blame others.
- Don't get complacent; demonstrate your value every day and challenge yourself to excel further.
- Commit to continuous learning. The more proficient you become, the more time you have to learn.
- Turn off the TV or put down the smartphone and read as much as you can. Read business books, leadership books, motivational books, industry books, and of course throw in your favorite novel once in a while.
- Work hard, play hard – exceed expectations, but make sure that you find a good life-work balance.

Learn from Mistakes

- Don't be afraid to make mistakes – trust me, you will make them! But don't beat yourself up; just be sure that you learn from them.
- Don't sweat the small stuff.
- Learn to take constructive criticism well – don't get defensive or go on the attack. Constructive criticism helps you grow professionally and personally.

Understand Your Manager

- Respect their knowledge and learn from them (the good and the bad – nobody's perfect).
- Understand what they are looking for from you – what are their needs and expectations?
- Never go in their office and just complain about something and point out all the problems; go in there and offer solutions, too.
- Don't be afraid to give your ideas and opinions when asked; you should also learn how to give your opinions when you are not asked.

Take Notes

- Always take notes in a meeting, even if no one else is doing it and you feel silly. Taking notes will help you to learn, retain, and develop.
- Developing procedures for those things you do on a regular basis and using simple checklists helps increase efficiency and productivity.

Recognize Others

- Most of the time there is a team or there are multiple people involved with a project; be sure to give credit to everyone involved. "Give credit where credit is due."
- Use "we" not "I" whenever possible.

Attitude, Attitude, Attitude

- Keep it positive; don't let other people's negativity get to you or affect your work attitude.
- Be proactive. You are talented and knowledgeable...don't wait to always be told; step up and do.
- Make it fun for yourself and for those around you (no matter how stressful work can sometimes become).

Dare to Dream and Follow That Dream

- Make sure that your manager knows your desired career path. Let your work speak for itself; your talent will be noticed.

[People Insights](#) – Uncover the unique talents of your people and align them to business goals
[Practice Management Tools](#) – Systems developed to help you build efficiency in your practice
[Know Service: Connect with Clients. Shape Your Future. Differentiate You.](#) – Full solution to analyze your client base and set up systems to properly serve your clients
[Performance Insights Process](#) – Complete analysis of your team dynamics, business effectiveness, and individual strengths

And for firms, we are available to speak at your events and develop practice management content and train your internal leaders. Our services are customized to your needs. Please contact [Krista](#) or [Sarah](#) for more information.

If you have any comments or suggestions on how we can better assist you and your practice, please know that we welcome your input. If you are looking for assistance on a specific project, please feel free to contact us so that we can craft the best solution for you using our own expertise or that of our strategic partners.

Warmest regards,

Krista & Sarah

© Copyright 2016. Know No Bounds, LLC & Paragon Resources, Inc., Atlanta, GA

THIS DOCUMENT IS FOR INFORMATIONAL PURPOSES ONLY AND WAS CREATED AS A PUBLIC SERVICE FOR THOSE INTERESTED IN THE SUBJECT MATTER. INFORMATION PROVIDED IN THIS DOCUMENT IS PROVIDED 'AS IS' WITHOUT WARRANTY OF ANY KIND. The user assumes the entire risk as to the accuracy and the use of this document. This document may be copied and distributed subject to the following conditions: 1) All text must be copied without modification and all pages must be included; 2) All copies must contain this copyright notice and any other notices provided therein; 3) This document may not be distributed for profit.

[Results-Driven Solutions: Essential Steps for Client Service Associates and Sales Assistants](#)

Visit our website to view all of our [Newsletters and Updates](#).
