



## Practice Advancement Program

### Execution Workshop

#### The Ideal TEAM

#### Workshop Description

What does it look like to have an Ideal Team? How would this impact me, my team members, and my clients? Explore key areas that will ensure you have a thriving, confident and loyal team who all work together toward mutual growth and client success.

#### Syllabus

##### Session One – Building a Thriving Team Culture

- Team member adoption of the practice’s vision and values
- Fostering meaningful and honest team interactions

##### Session Two – Defining Roles and Responsibilities within the Team

- Viewing the organizational chart from a “roles” perspective
- Clarifying job responsibilities
- Identifying gaps in role coverage and overcommitments of team members

##### Session Three – Hiring Strategies

- Resource Strategies
- Candidate Vetting and Qualification
- Conducting Effective Interviews

##### Session Four – Maximizing Productions through Team Accountability

- Effective Measurements
- Reviewing Team Members and Team Performance

\*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course.