

THE  
**TEAM**  
GAME™

**WORKBOOK**

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GAME™

# THE TEAM GAME WORKBOOK

**How has your business and focuses changed during the last 24 months?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Have you and your team adapted the change necessary to succeed through the pandemic?**

YES                       NO

**What is your vision for your business and your team over the next 12 months?**

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## SALES PROCESS: OPTIMIZING YOUR TIME

How has your model week changed?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

How has the way prospects buy and engage changed?

INFORMATION ASYMMETRY	INFORMATION PARITY
Dependent on Sales Rep/Advisor	

## CLIENT ENGAGEMENT

PRE-PANDEMIC	POST PANDEMIC / FUTURE
FACE TO FACE MEETINGS	
IN PERSON / DINNER SEMINARS	
NETWORKING EVENTS	
CALLING CLIENTS TO BOOK MEETINGS	
WORD OF MOUTH / REFERRALS	
BROCHURES / BUSINESS CARDS	

EXAMPLES: Zoom, Virtual Seminars, Calendly, etc.

## CLIENT SEGMENTATION

- Now more than ever clients and prospects want information
- The way we have segmented has changed
  - age-based segmentation
  - next generation segmentation-easier than ever virtually

CLIENT	LIFE STYLE	AGE	NEXT GENERATION	BUSINESS OWNERS	TARGET MARKETS
Example	Marital Status, Empty Nester, etc.	55, 59.5, 62, 65 & 70	HENRY	Physicians, Small Business Owners	Women, LGBTQ
A					
B					
C					
D					

## CLIENT EXPERIENCE MODEL

- Weekly Tactics
- Monthly Tactics
- Rate the Engagement

	A	B	C	D
WEEKLY MARKET COMMENTARY	X	X	X	X
MONTHLY VIDEO MESSAGE	X	X	X	X
VIRTUAL EDUCATIONAL SEMINARS	X	X	X	X
VIRTUAL CLIENT EVENTS	X	X		
SOCIAL MEDIA POSTS	X	X	X	X

For additional resources please visit  
[TheTeamGame.com](http://TheTeamGame.com)

## YOUR MANAGEMENT STYLE IN A REMOTE ENVIRONMENT

\*List out your past management style vs. where you think you are now

PRE-PANDEMIC	POST PANDEMIC / FUTURE
MANAGERIAL STYLE:	
PROVIDE CONSTANT INSTRUCTION AND SUPERVISION:	
NON-PRODUCING HOUR:	
AUTHORITATIVE:	

EXAMPLES: Hands off; let the team run itself, micro manager, hierarchical, transformational leader, authoritative.



## ROLES AND RESPONSIBILITIES

PRE-PANDEMIC	POST PANDEMIC / FUTURE
<b>TEAM LEADER:</b> Works directly with the team, lead generator, engages A clients	<b>TEAM LEADER:</b>
<b>JR. PARTNER:</b> Focuses on the B clients opportunities, manages the sales process and assists in closing with associates	<b>JR. PARTNER:</b>
<b>ASSOCIATES:</b> Calls the B and C clients for face to face meetings, actively prospecting for new leads to pass to Jr. partner and ideal clients for Team Leader	<b>ASSOCIATES:</b>
<b>PMA / ADMIN:</b> Scheduling, paperwork and marketing support	<b>PMA/ADMIN:</b>

# EMPOWERMENT

**IDEAS TO IMPROVE YOUR VALUE PROP FOR ATTRACTING THE NEXT GENERATION**

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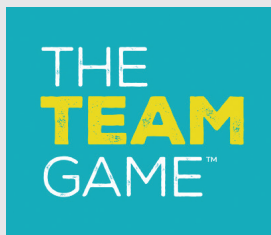


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