



Practice Coaching Facilitation Questions/Exercises

Note: these questions can be added into the training as required

1. Where do you see the future of the financial planning industry?
2. If there was a negative event tomorrow, do you believe you could predict how your clients will behave?
3. How much time do your clients spend worrying about money rather than learning how to handle it?
4. What distinguishes people reaching their goals and others not?
5. Do you want to invest like Warren Buffet?
6. Do you know where there is common ground or differences with your family members?
7. How do you assess people? Intuition?
8. What is the greatest risk in your business right now?
9. Describe a good client relationship
10. What is the goal for your business in the next 1 to 3 years?
11. What differentiates your business? How could your business be further differentiated?
12. What are the barriers to the development of your business right now?
13. When will you have reached optimal productivity in your business?
14. How could you make changes to your business?
15. What if I said to follow the 80/20 rule tomorrow re your clients? What would you do? And How Would You Do It? (How would you customize and document processes, refine communication, select clients, hire staff)?
16. Why have clients hired you?
17. Describe a client relationship that failed and why
18. Why have clients fired you?
19. How much time and money do you spend acquiring new clients?
20. How would your clients describe you?
21. Have you ever had difficulty in getting a client to commit to a plan?
22. What makes you decide you are prepared to take on a person as a client?
23. Have you ever seen a client's behaviour suddenly change?
24. Have you experienced a client quickly changing a strategy as a "knee-jerk" reaction to an event? Why would that have happened
25. How do you get a client from the front door to trust? How long does it take? (people buy because they feel understood)
26. What do you information do you try and find out from clients in the first 30 minutes of the meeting?
27. What tools and processes are your advisors using to assess risk tolerance?
28. Do you use personality or psychological assessment tools to hire people?
29. Describe your greatest team mate?
30. What would your greatest team mate say about you?
31. What do your advisors want from education programs?
32. How do your staff know if they have done a good job each day?