



BUSINESS
BUILDERS
ACADEMY™

CONNECT AND SUPPORT CHECK-IN™



GET CLEAR. GET FOCUSED. GET RESULTS.™

Introduction

In this period that has required all of us to adjust to new methods of working and being together, we want to provide a quick and simple way for the leaders of this firm to regularly connect with you, hear how you're doing, and how we can be supportive of you. We also want to be sure that as a firm, we are serving our clients and each other.

ClientWise, in response to the request of several firm leaders, developed this short, straightforward check-in tool that can be used for us collectively as team members. Like us, ClientWise is also concerned that you and your family are doing well. To help with that, they also included a section for you to use personally, which is only for you and your family's use and does not need to be shared with the firm.

Our most important aim in using this tool is to ensure that we collectively remain connected and supportive of each other. Let's help all of us do that by using the tool and sharing our responses with each other prior to our next team meeting. Let's be forthright with our answers. We will use the responses for discussion as a team and to determine what we need to continue to do and what we need to change. We will also decide how often we will use this tool as we continue to work virtually. Thank you in advance for participating and we truly look forward to hearing from all of you.

Name:

Date:

Connect and Support Check-In™

Please answer the six questions below and then fill in the Keep-Stop-Start Exercise™ that follows:

1. How are you, and if applicable, your family, doing generally?

2. How are you feeling about our virtual team and why? (examples: connected because we are meeting regularly as a team; disconnected because it is harder to communicate with others)

3. Are the quantity of our team communications about right, not enough, or too much?

4. How do you feel about the quality of our team communications?

5. How do you feel we are doing as a team in serving our clients and where could we be better?

6. What support are we giving you that is helpful to your work and life and where do you need additional support?

Keep-Stop-Start Exercise™

Based on your feelings, observations, and answers to the questions above, please indicate below the top three of what we are doing as a team and as leaders that we should keep doing, the top three of what we should stop doing, and the top three of what we should start doing. You might also want to think about and/or indicate what your personal contributions will be to keeping, stopping, and starting the activities.

KEEP	STOP	START

For You And Those Important In Your Life

As we mentioned, ClientWise wanted to provide something additional which is for you personally. This is strictly for your personal use and it is optional for you to use it. If you do use the questions and chart below, you do not need to share the answers unless you want to. We also suggest that you might wish to have the people who are important to you (examples: partner, family, close friends) fill this out as well, share your responses, and use it as a basis for discussion to ensure connection and support during these times. To start, here are some questions to answer and encourage yourself and all who answer to be very forthright in their responses.

1. How are you doing generally?

2. How are you feeling about your relationship(s) with me and others and why? (examples: connected because we are supporting each other; disconnected because of boredom or attention to work while home)

3. How is the quantity and quality of our communication?

4. How do you feel we are doing as people who love each other in connecting and helping each other and where could we be better?

Keep-Stop-Start Exercise™

Based on your feelings, observations, and answers to the questions above, please indicate below the top three of what we are doing as people who love each other that we should keep doing, the top three of what we should stop doing, and the top three of what we should start doing. We might also want to think about and/or indicate what our individual personal contributions will be to keeping, stopping, and starting the activities.

KEEP	STOP	START

Notes:

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ClientWise Coaching and Consulting Services


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