



HeadSTART Game Changer Playbook

Transforming financial advisors into front runners
in their field with endurance and excellence.



Create a winning mindset
Generate a championship game plan
Perform with increased focus
Gain your competitive edge
Achieve next level practice performance

At **HeadSTART Advisor Coaching Academy**, we believe in developing a winning mindset, focus and strategy for your financial advisory practice. Just like in sports, where a well-coached team can achieve greatness, our playbook will help you reach your peak performance in practice management. Let's gear up and prepare for success!

The foundation of working together will be creating your **ICA**.

What is your **Intent**?

What is required to create **Commitment**?

What is the **Action plan** and **Accountability** moving forward?

Tools, resources, feedback, motivation and accountability will be provided as we work through collaborative coaching engagements.

HeadSTART Advisor Coaching Academy Playbook

(Refer to Appendix B for further details)



*Team Play is optional at discretion of advisor

Appendix A:

Coaching Format and Investment HeadSTART Game Changer Packages

HeadSTART Game Changer Package	Time Investment*
	*All packages include email support between sessions and access to HeadSTART coaching resources
3 months	1 x per week for 4 weeks (at start) = 4 1 x per month (thereafter) = 2 Total Engagements = 6
6 months	1 x per week for 4 weeks (at start) = 4 1 x per month (thereafter) = 5 Total Engagements = 9
12 months	1 x per week for 4 weeks (at start) = 4 1 x per month (thereafter) = 11 Total Engagements = 15

Appendix B:

HeadSTART Advisor Coaching Academy Playbook

PRE-SEASON

Warm up

Before the big race or the big game, every successful athlete participates in a rigorous pre-season warm-up to identify strengths and areas for improvement. In this case, you will complete a comprehensive self evaluation prior to the kickoff meeting. This evaluation assesses your current practice management techniques, client engagement strategies, and overall business performance.

The Competitive Edge Evaluation (Survey and Checklist)
Snap Drill - Enhancing your Game SWOT Analysis
Shaping your Balanced Offense Exercise (Values and Priorities Inventory)
Securing a Win - SMART goal setting activity

Competitive Gain

Identifies strengths and weaknesses, sets clear goals, and is the opening play to your kickoff meeting and creating a customized coaching playbook.

KICKOFF MEETING

The starting line up

The kick-off meeting sets the stage for a successful coaching journey, empowering the financial advisor to achieve their goals and excel in their practice management.

Meet the Coach: Introduction of the coach and the financial advisor.

Raising Anticipation: Outline the objectives and expectations for the coaching program.

Analysis of Pre-Season Performance: Discuss the results of the **Competitive Edge Evaluation, Snap drill-Enhancing your Game SWOT Analysis, Shaping your Balanced Offense Exercise and Securing a Win-SMART Goal Setting Activity**. Highlight key strengths and areas for improvement.

Establishing Baselines: Set initial benchmarks for practice management acumen goals.

Defining Success: Identify specific, measurable goals for the coaching program.

Aligning Objectives: Ensure that the advisor's goals align with overall business objectives and client needs.

Performance Metrics: Track progress by establishing key performance indicators (KPIs) to monitor progress throughout the coaching program.

Open Forum: Allow time for the coach and financial advisor to ask questions and seek clarification on any aspect of the coaching program.

Next Steps: Outline the next steps and set expectations for the upcoming sessions.

Competitive Gain

Enhanced Self-Awareness: The advisor gains a clear understanding of their current performance, strengths, and areas for improvement.

Focused Goal Setting: The advisor sets specific, measurable goals that align with their business objectives and client needs.

Strategic Advantage: The advisor develops a tailored practice management strategy, giving them a competitive edge in the industry.

Continuous Improvement: The advisor receives ongoing coaching support and training, ensuring continuous improvement and adaptation to changing market conditions.

Measurable Results: The advisor tracks progress using established KPIs, enabling them to measure the impact of the coaching program on their practice management and client engagement.

SKILL BUILDING SESSIONS

THE MINDSET EDGE

Mindset Check – Creating your Mental PowerPlay

Just as athletes require regular mindset conditioning to spot weaknesses and enhance performance, advisors benefit from a mindset check by a coach. This essential part of mindset preparation and development helps identify and sideline blind spots and unproductive thoughts, emotions and behaviours.

Competitive Gain

Much like a pre-game warm-up, a mindset check keeps advisors mentally sharp and emotionally balanced, builds agility and resilience to tackle any challenges ahead. It fosters a growth mindset, akin to an athlete's drive for continuous improvement and peak performance.

CORE STRENGTHENING

Core Skills Development

Focused sessions in core practice management areas as defined by your **Competitive Edge Evaluation**.

YOUR FANS (Your Clients)

YOUR FRANCHISE TEAM (Your Company)

YOUR OPPONENENTS (The Competition)

THE PLAYING FIELD (Context)

YOUR TEAMMATES (Collaborators)

Competitive Gain

Builds a strong foundation of business acumen, essential skills, enhances efficiency, improves profitability and client relationships.

PRECISION SPRINT DRILLS

Performance Optimization: Training for the Big Game

Just like any top-tier sports team, businesses need short, intensive training sessions designed to enhance specific aspects of their practice management, such as client communications and networking. These sessions are analogous to focused drills that athletes use to fine-tune their skills and stay at the top of their game.

Competitive Gain

These sprint drills provide quick wins, boost performance in targeted areas, and ensure that the business remains agile and ready to tackle any challenges that come its way.

ENDURANCE CONDITIONING

Long-Term Strategy Building

Planning the strategy for the long game, including offensive plays to expand market reach, defensive maneuvers to retain current clients, and special team's tactics to enhance brand recognition.

Competitive Gain

Ensures sustainable growth, prepares the team for future challenges, and helps create a championship legacy.

MID-SEASON REVIEW

Evaluations and Observations

Just like a coach reviewing game footage to assess performance, regular reviews help to evaluate progress toward goals, provide constructive feedback, and adjust coaching plans and strategies as needed.

Competitive Gain

This ensures continuous improvement, identify new opportunities, celebrates victories, and maintains motivation.

SIDELINE STRATEGIES

Sideline Coaching

Access to ongoing mentorship and support from your coach between sessions.

Competitive Gain

Just like a team has a coach to guide them during a game, this support provides a network that fosters collaboration and encourages continuous learning.

TEAM PLAY

Collaboration

Option to engage with team members to ensure unified efforts. Incorporating team members in the business coaching process can transform the entire team's dynamics and drive overall success.

Competitive Gain

Enhanced Communication: Regular interaction fosters open lines of communication, ensuring that everyone is on the same page and that feedback flows freely.

Increased Buy-In: When team members are actively involved in the coaching process, they are more likely to buy into the strategies and goals set forth, leading to better implementation and results.

Shared Insights: Team members bring diverse perspectives and experiences that can enrich the coaching process, offering insights and solutions that might not have been considered otherwise.

Improved Morale: Engaging team members shows that their opinions and growth matter, which can boost morale and foster a positive work environment.

Skill Development: Collaborative coaching provides opportunities for team members to learn from each other, improving their individual and collective skills.

Strengthened Relationships: Working together in the coaching process can strengthen relationships within the team, fostering a sense of unity and collaboration.

Increased Accountability: When team members are part of the coaching process, they are more likely to hold themselves and each other accountable for progress and results.

Adaptability and Resilience: Engaged teams can better navigate changes and challenges, as they are collectively more adaptable and resilient.

Alignment with Goals: Ensuring team members are involved in setting and understanding goals leads to better alignment with the practice's vision and objectives.

Empowerment: Team engagement empowers individuals by giving them a sense of ownership and responsibility in the coaching process.

THE SUCCESS HUDDLE

A Championship Coaching Session

The success huddle is where we gather to honour achievement and strategize for future wins—just like a championship team regrouping after a victorious season. In this session, we'll come together to:

Celebrate Milestones & Achievements: Relive your greatest victories as we celebrate milestones and achievements, just like athletes revel in their championship wins. This is our moment to appreciate the dedication, hard work, and teamwork that brought you success.

Reflect on the Journey & Lessons Learned: Analyze your "game footage" by reflecting on the journey and the lessons we've learned. We'll identify what worked well and areas for improvement, ensuring you continuously evolve and grow from every experience.

Conduct a Final Evaluation: Much like a coach reviewing the season's performance, we'll conduct a thorough evaluation of our accomplishments and areas for growth. This will help understand your strengths and opportunities for future improvement.

Set Future Goals for Long-Term Success: Develop your "playbook" for the future by setting clear goals and strategies for succession planning and continuous improvement. This is your game plan to ensure sustained excellence and long-term success.

Celebrate as a Team: Just like a team's victory celebration, we'll come together to honour each team member's contributions, fostering a sense of unity and shared accomplishment.

Plan for the Next Season: Like strategizing for the next sports season, we'll outline your next steps and initiatives to ensure we stay at the top of our game. We'll focus on innovation, collaboration, and pushing the boundaries to achieve even greater success.

Competitive Gain

The team remains a championship contender, ready to face new challenges and achieve even more victories.

Final Notes

By following the **HeadSTART Advisor Coaching Academy Playbook**, you will be well-equipped to take your financial advisory practice to new heights. Our role is to guide you through that process with structure, clarity, and compassion, helping you get to the finish line with confidence and pride.