

# Expanding Your Wealth Team Worksheet

As a leader of your business and your life, you will need to build teams to assist you in reaching your goals. Without your vision, your leadership (and your team) will fail. As a leader, you have several roles – the first is to determine the types of people you need on your team. The second is to locate and put these people in place on your team in the most efficient manner possible. You must also continually update your team members with the vision, the reason they are on your team, and what you are creating together, to keep them motivated and empowered to take action.

There are three kinds of people that you will need on your team to help you. The first is a group of people who help you with the everyday tasks for your business. This may be the receptionist, bookkeeper, sales team or marketing. The second is a group of professionals that help you carry out the strategic actions you need for your business, but are not there in an every day kind of way. These are CPAs, lawyers, tax people, financial planners, insurance agents, and brokers. The third is the team that helps you with personal household chores and tasks, freeing you up to do the things you love. These may be gardeners, housekeepers, cooks, pool maintenance, or nannies.

Let’s make a list of those people you might have now:

<b>Contractors or Employees Working in the Business</b>	<b>Professionals or Advisors Helping with Strategy</b>	<b>Household or Personal</b>

Now, let’s consider that as your business grows, you will need more of these kinds of people around you. You will need a tax attorney for corporate structuring, a CPA and business attorney for legal contracts and financial advice. The list goes on. Take a few minutes and picture yourself inside the business you’ve built, and consider who will you need. Use the chart below to record your answers:

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communicate in a way that serves you both, so that there are no clashes or misunderstandings because of a difference in style.

2. Next, we interview everybody. Yes, I mean *everybody*. Many business owners take the first person that comes along and seems able to fulfill a role, but we are looking for longer term relationships here. Of course, the interview questions are different depending on the type of the role, but the interview process is the same.

## ***How to interview team members***

For each role, you will determine the questions you will ask, AND the answers you'd like to hear ahead of time. Bring the questions along to any appointments you might have with professionals and record the answers they give. Here are some sample questions you might ask for each type of person on your team: (though all questions might work in many situations)

### **For employees or contractors:**

What is your preferred work style?  
How do you feel you would contribute to this company?  
What does success mean to you?  
Can you give me references?  
How do you schedule your time?  
What is your favorite hobby?  
What is your area of expertise?  
What do you consider to be your greatest strength?  
Why would you want to work here?  
What mistakes have you made?  
How did you deal with the mistake?  
What is your level of availability?

### **For Professionals or Advisors:**

What types of tax strategies do you use?  
How long have you been in business?  
What is the average net worth of your clients?  
What is your greatest strength?  
How do you work with your clients?  
Can you provide references?  
What % of your business is done with businesses like mine?  
What is your tax bracket?  
How creative are you?  
Do you understand my business?  
What accomplishment are you most proud of and why?

**For Household or Personal:**

- Do you have experience?
- Are you self-directed?
- How do you feel about staying late if something needs to be done?
- Are you detail oriented?
- What is your dream?
- What is stopping you from achieving your dream?
- When was the last time you failed?

Don't forget to add any other questions that you might have!

Now that you have your questions chosen, you'll want to record the answers you'd like to hear and also the answers the person gave. Additionally, you'll want to record the person's PSI score. Use the chart below to assist you:

**Position or Role:** \_\_\_\_\_

**PSI Score:** \_\_\_\_\_

Question	Desired Answer	Answer Given	PSI Score

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