

# LEADING YOUR TEAM IN TIMES OF CRISIS—PART 3

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## Lead Your Team to Serve Your Clients

You and your team are calm, connected and focused so you can be a powerful resource for your clients—you've got this. Now let's reinforce your leadership operating model to build on that shared readiness and serve your clients.

Many leaders understandably worry about the financial impact of this crisis on their finances and their ability to compensate and retain their teams. While compensation is important to team members, research shows it's not what most strongly drives motivation and retention. In fact, it's the leadership actions needed to thrive in a crisis that do.

People who feel they have a clear purpose and direction, are making progress in meaningful work and are personally growing are more likely to stay and help your business continue to thrive. It's when those are not on the table that compensation becomes their primary—if only—driver of staying or leaving. And in a crisis, they are your levers of success.

1. **Ensure clarity.** In part 2 we addressed the [importance of grounding the team on their purpose](#). Now we want to ensure we have clarity on where we are and where we are headed. Leaders can focus on three elements to achieve this:

- **Situational awareness** – What's our current reality? In the Navy, we used the term "situational awareness" (SA) to capture who's where, what they're doing and what they see. Use frequent—daily, if a lot is going on—group check-ins for your team to build SA. Use open-ended questions (starting with *what* and *how*) to foster dialogue among the team about what's going on internally and with clients and what that might mean for the business. Conclude by summarizing what you believe it means and then move to align the team on intended outcomes.
- **Leader's intent** – What outcomes do we want to achieve? Every order in the military should have two components. First is what we hear in the movies: "*Take that hill!*" That tells what to do. The second part you never hear in the movies is actually the more important part—the leader's intent. This describes the leader's intended outcomes: the *why* of the order. Arm your people with your leader's intent and they can adapt and improvise what they do to achieve the desired outcomes.
- **Scenario planning** – What might happen and what might we do? While on a daily basis teams need constantly refreshed SA and leader's intent, we also need to look downrange and plan ahead. As Yogi Berra said, "*It's tough to make predictions, especially about the future.*" This is worse during a crisis, making planning both harder and more important.

Top military units address this by anticipating multiple futures through scenario planning. Task your team to come up with various *what if* possibilities—good and bad. Then discuss as a group what each might mean for clients and the business and what actions you might take as a result. This builds better shared understanding of future possibilities and the ability to pivot more quickly as a team when things change. As a result, this also build the team's confidence that they can succeed in an uncertain future.

2. **Ensure progress.** Leadership is full of tensions. Ensuring progress while not killing motivation by micromanaging is one of the most challenging. Recall from part 1 that our [internal threat responses urge us to assume the worst and control everything](#). Three behaviors can help us ensure progress toward the leader's intent we gave our team:

- Frequent communication – In an uncertain or rapidly changing environment, communication must increase in frequency, with daily one-on-one contact being a good default. It need not be long: 15 minutes might be sufficient. This ensures people inform and understand your updated SA and priorities and have confidence that they're working on the business's greatest priorities.
- Check in with them (not check up on them) – Continue to view yourself as serving the business and team by prioritizing your interactions on what information, resources or help they need to succeed. If they aren't achieving objectives, it's likely not because they don't care or are lazy, but because they're missing something. You likely have the knowledge, experience or resources to provide it.
- Delegate and trust – While your threat response will urge you to do otherwise, delegate more in a crisis. The less you are personally doing, the more you can see how everything is working, how the external environment is evolving and where your energies can be best applied. Then you need to trust that you've hired the right people and that they will find a way to achieve the desired outcomes. Delegating will feel risky, but building SA, sharing leader's intent and frequently checking in will greatly reduce that risk. The alternative is your people not feeling trusted, utilized or motivated (and your plate being too full for you to notice).

3. **Ensure growth.** Leaders succeed not just by delivering results today but also by ensuring the growth that equips the team to deliver more in the future and strengthens their confidence to thrive through the crisis. Consider three dimensions of growth you can foster:

- Grow the team – A leader influences whether their team feels they're passively surviving a crisis or actively getting stronger through it. Time is tight, and opportunities to stop and train people are few, but fast feedback and extracting learning from the work itself doesn't take much time, just intention.

Use team check-ins to solicit lessons learned through questions like, *"What do we know now that we didn't know a week ago?"* or *"What have we learned in the past week that we could apply to our efforts next week?"* Recognition of this growth will drive improved motivation, engagement and results.

- Grow the network – As you look for ways to best serve your clients, consider how you might expand your own network to do so. As a financial advisor, if you focus on the outcomes clients need rather than just the services you provide, you might identify needs your clients have or will have that could be served by other providers, like CPAs or attorneys.

Now might be a great time to expand your professional community with "centers of influence." This could help you and network partners address more complex issues than any one of you could alone. It can also serve as a great business development resource going forward.

- Grow the business – Just as your team will long remember how you led them during this crisis, your clients will remember how you engaged with them when they were at their most stressed. Applying the same traits of servant leadership as discussed for your team in part 2, [ensure your whole team engages clients sympathetically from a place of service](#). Encourage them to assume clients are more worried and have more going on than might be evident. Being of help and service now are the best ways to grow your business for the long term.

Also use this incredibly disruptive experience and client feedback to consider your business model and value proposition. When the dust settles, you might resume work exactly as before. However, you might gain insights from this experience about what clients need and what you want to be for them that you didn't have before. This could inform how you choose to grow and evolve your business as we emerge from this and reboot life as "normal."

I want to leave you with two final thoughts.

First, the use of the word "ensure" in the key points above was intentional. A leader's job is not to author the plans, develop the tools and direct action. It is to ensure there's a clear plan, ensure people have the tools they need and ensure outcomes are achieved. Share the burden with your team. Involve them in co-creating plans and tools. If you unleash their intelligence and energies to address the problems and opportunities emerging from this crisis, your team could come out of this stronger and more capable than before.

Finally, the tools we've explored in this brief series do not have a sell-by date. Leading in times of crisis does not differ fundamentally from leading in "normal" times. Think of it being more like the difference between running in sand and running on a track. If your leadership can succeed in this environment, it will excel and flourish when we get back to more

conventional working circumstances.

Consequently, stepping up to the challenge of leading your team through these challenging times will have you more prepared than ever to win in the long run. Best of luck!

If you wish to explore any of these topics for your team, please check out the entire Leading Your Team in Times of Crisis series.

For standardized performance and the most recent month-end performance click [here](#) NOTE, this material is intended for electronic use only. Individuals who intend to print and physically deliver to an investor must print the monthly performance report to accompany this blog.

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