

Delivering breakthrough value



DWS Team Edge best practice series

Provide your team and organization with ideas and guidelines to become more efficient and impactful when working with clients.

Best practice: Team charity commitment

Many advisors are committed to giving back to their communities and having a positive and meaningful impact on causes or organizations. This can provide many benefits, both personally and professionally.

Best practice: Maximize a team's impact on a cause or mission that is committed to a team charity or cause.

In addition to greatly benefitting the charitable organization, it can provide significant benefits to your team, including:

- _ Quality time together outside of the office, in a wholesome and positive environment, enhancing esprit de corps.
- _ Being part of something bigger provides cohesion and a greater sense of purpose for your team and its members.
- _ The power of teams; your focused, collective efforts can provide a greater impact on your focus charity/cause.
- _ Team members will be engaged in the community in a positive and service-oriented manner.

A process for achieving this includes:

- _ Conducting a team meeting to introduce the "Team Charity" concept
- _ Encouraging all team members to give some thought to causes or organizations that would benefit from your team's involvement. Ask them to reach out to a local representative of that charity/cause to discuss how a focused commitment from your team may impact their mission. Schedule a follow-up meeting 1-2 weeks later to discuss all options.
- _ At the second team meeting, have team members share what they've learned. Have an open discussion and mutually agree on the charity/cause where you will focus.
- _ Start developing a Team Plan that outlines how you will work together for maximum impact on the charity/cause. This may include any combination of volunteer hours, sponsoring events, etc.
- _ Share your commitment with clients, to broaden the reach and impact of your efforts. This also demonstrates connectivity to the community.
- _ Some teams stick with the same charity/cause year after year, while others pick a new focus each year. Both approaches have merit.

When teams have a Shared Vision and work together with a sense of purpose and alignment, they can accomplish great things. This can go beyond the meaningful work you do for clients and extend to the impact on your communities and organizations.



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