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Employees (/admin/grow/tracks/07172a52-4dda-4c91-8512-ba5184e31f23/employees)

Settings (/admin/grow/tracks/07172a52-4dda-4c91-8512-ba5184e31f23/settings) Add track admin Publish track ...

<p>Competencies +</p>	<p>S1 - Client Wealth Coordinator ...</p> <p>Performance Scale: 1 = Needs Work / 2 = Inconsistent / 3 = Consistently Demonstrates / 4 = Always Excellent</p> <ul style="list-style-type: none"> New CWC expected to be mostly in 2 range with some in the outlier ranges. CWC with 1-2 years experience at Destiny should be in the 3 range most of the time. CWC with 3+ years at Destiny Capital should be in the 3 range with some 2 areas. NEEDS LANGAUGE AROUND PROMOTION TO SR. CWC <p>Show less</p>	<p>S2 - Sr. Client Wealth Coordinator ...</p> <p>Performance Scale: 1 = Needs Work / 2 = Inconsistent / 3 = Consistently Demonstrates / 4 = Always Excellent</p> <ul style="list-style-type: none"> New Sr. CWC expected to be in the 3 range with some 2s. Sr. CWC with 1-2 years at Destiny Capital should be in the 3 range most of the time. Sr. CWC with 3+ years at Destiny Capital should be in the 3 range with a few 4s. Sr. CWC should be in the 3 range for at least 5 of the areas for 2 consecutive quarters. Sr. CWC rated ready for 25 clients would need to be consistent with that role for 1 year before Strategist ready. <p>Show less</p>	<p>S3 - Client Wealth Strategist ...</p> <p>Performance Scale: 1 = Needs Work / 2 = Inconsistent / 3 = Consistently Demonstrates / 4 = Always Excellent</p> <ul style="list-style-type: none"> New Strategist expected to be mostly in the 3 range some 2s. Strategist with 1-2 years at Destiny Capital should be in the 3 range most of the time. Strategist with 3+ years at Destiny Capital should be in 3 range with a few 4s. Partner Candidate should be at a 4 in all areas for 2 consecutive quarters. Partner ready must be at the Partner Candidate level consistently for a full year for consideration. <p>Show less</p>	<p>+ Create track level</p>
<p>Accuracy</p>	<ul style="list-style-type: none"> Accuracy in data collection, entry, client facing materials, and client communications. CRM client records are maintained and up to date. 	<ul style="list-style-type: none"> Accuracy in data collection, entry, client facing materials, and client communications. 	<ul style="list-style-type: none"> Accuracy in data collection, entry, client facing materials, and client communications. 	
<p>Communication Quality</p>	<ul style="list-style-type: none"> Communications are empathetic, helpful, and clear. <ul style="list-style-type: none"> These include emails and client facing materials. 	<ul style="list-style-type: none"> Communications are empathetic, helpful, and clear. <ul style="list-style-type: none"> These include emails and client facing materials. 	<ul style="list-style-type: none"> Communications are empathetic, helpful, and clear. <ul style="list-style-type: none"> These include emails and client facing materials. 	
<p>Client Planning Contributions</p>	<ul style="list-style-type: none"> Relevant facts are gathered and documented to allow a successful client interaction. Knows what we need to know to answer client questions and help them. 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	
<p>Triage of Client Needs</p>	<ul style="list-style-type: none"> The correct client service requests are routed to the appropriate internal resource in a clear and timely manner. Effective at both handling tasks that should flow to them and asking the Strategist to handle advice and planning related questions. Proactively conducting research, drafting communication responses for Strategist review, and general problem solving. <ul style="list-style-type: none"> Note: Being more proactive in solution finding is a hallmark of more experienced Coordinators 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	
<p>Client Service Task Effectiveness</p>	<ul style="list-style-type: none"> Effective handoff of client service tasks to internal 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Effective handoff of client service tasks to internal 	<p style="text-align: right;"></p>