



This Rugby Mindset Will **Future-Proof Your Business Team**

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International Rugby star Sonny Bill Williams was legendary for his offloads, a maneuver executed when a ball-carrying player who is tackled delivers the ball to a nearby teammate, thus keeping the ball in play. Williams' unrivaled ability to take the ball into a collision, keep his hands free, and get into position to pop the ball to a runner played a major role in his New Zealand team's World Cup wins in 2011 and 2015.

Offloading is a skill. More importantly, it's a mindset. As elite Rugby coach Jason Holland explains:

TO BE A GOOD OFFLOADING TEAM, PLAYERS MUST HAVE THE ATTITUDE TO OFFLOAD. WHEN THE BALL CARRIER IS TACKLED, HE SHOULD BE LOOKING TO MAKE THE PASS. HE CAN'T DO IT EVERY TIME, BUT HE NEEDS THAT MINDSET.

THAT ATTITUDE FEEDS INTO THE MINDS OF SUPPORT PLAYERS, WHO WILL RUN LINES TO BE ABLE TO TAKE THE PASS. THEY MUST BE ABLE TO READ THE SORTS OF PASS TEAMMATES MIGHT USE AND ANTICIPATE WHERE TO BE.¹

That's exactly the mindset your team needs if you want to create an industry-dominating client experience. In our wealth management practice, offloading is more than a metaphor. It's a key part of how we do business. So, what does offloading look like in our culture?

Under normal circumstances, there are predictable times when we're not under pressure, such as when preparing for scheduled client meetings. We share pre-defined information back and forth, akin to a



Rugby team passing the ball when the field is clear. Other times are more pressured, and that's when offloading comes into play. Take the March 2020 stock market crash in the wake of the coronavirus pandemic. Clients were shell-shocked, and we needed to support them at a time when our own business operations were disrupted by the public health emergency. Surrounded by unprecedented volume and unanticipated challenges, our team needed to figure out how to continue to enhance our client experience. To expand our capacity during such a turbulent time, everyone had to get better at offloading important tasks, and everyone had to "get into position" to catch offloads.

On our team, we don't just practice offloading—we ritualize the mindset of collaboration by referring to shared work as offloading. When I need someone to take ownership for addressing a client need, I say "I have an offload for you." I use that terminology because in leadership, language matters. When I tell someone that I have an offload for them, it immediately signals that the task is high importance, and we cannot drop the ball.

One of the most difficult things in our business is to connect team members who don't directly interact with clients to the overall client experience. The ritual of offloading, including the use of the term offload, helps increase our team's commitment to the client

experience. It deepens people's understanding of the importance and urgency of what we collectively do.

The ritual of the offload also accelerates team member development. New or junior team members often don't fully appreciate the significance of their work. It typically takes time for them to realize "I own this." If I send an offload by email, for instance, the receiver needs to learn that there is no excuse for dropping the ball. I coach people to understand that they are expected to carry the ball all the way—until they can't. Then they are expected to clearly state that they need help, at which point they offload to me or someone else on the team.

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and team offloads, per game, and per season. On your business team, you probably already have members who are virtuoso offloaders and offload receivers. They take the ball. They run with it. When

they are stopped, they make sure the ball never dies. Against all odds, they find a way to offload to others. They're your A players, and they're beautiful to watch in action. But you can only create consistently delightful client experiences if everyone on your team practices their offloading skills. As their leader, it's your job to help your team deepen their offloading mindset, to seek out opportunities to collaborate on behalf of clients. If you coach them well in offloading, together you'll successfully navigate any challenge, whether it's a global crisis, or more happily, a generational transition.



Contact Saša Mirković at Inspire Network to learn more about strategies for creating transformational growth or positioning your business for a successful generational transition.

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