

Think your company is too small to invest in professional development that's high-impact and high-ROI?

Discover how Cook Wealth leveraged RaderCo's Team Training + Coaching to help their 25-person staff better manage their inboxes and their time, and jump-start the creation of company processes to set them up to scale



"Investing in RaderCo allows us to take a wide approach to professional development and invest across the firm. We're able to improve the way we do business throughout our entire company, which results in a higher ROI than if we just invested in specific individuals."

Jason Deshayes

CHIEF OPERATING OFFICER



"Our investment in RaderCo has given us the resources and the policies that will keep providing return in the future."

Sophie Howell

CHIEF EXPERIENCE OFFICER



When Cook Wealth’s Chief Operating Officer Jason Deshayes reached out to RaderCo in 2022, he was looking to take a different approach to how the company invested in professional development.

As a wealth management firm with 25 employees, Cook Wealth had historically invested in development for individual employees, yet after a period of heavier than usual turnover, Jason wanted to find an option with a wider and longer lasting reach.

“In the past, we’d made investments in specific people, and then some of them would leave,” Jason said. “When you start counting the dollars of that approach, it’s a lot of money for not a lot of return. **We knew we needed to stop investing in the individual components of the team and invest in the team as a whole instead.**”

Sophie Howell, Cook Wealth’s Chief Experience Officer, said there were definitely areas of their work culture they could improve

on as a team – such as email and time management – especially after more than two years of working remotely during COVID.

They were also in need of developing processes around certain tasks so they could work more cohesively and prepare for business growth.

“We’d all worked at home for so long that when we started coming into the office again, it was clear no one was doing anything the same way,” Sophie said. “We knew we wanted to scale the business, and we needed to establish some processes around specific things that would help us do that.”

Several years earlier, Jason had seen RaderCo’s Founder Marcey Rader lead a presentation on inbox management, and loved the strategies she shared.

He thought her productivity coaching and consulting would be perfect for Cook Wealth’s staff, specifically because it was **tangible, practical, and applicable to everyone.**

So, Jason reached out to RaderCo and decided to invest in their



Team Training + Coaching package – tailored team workshops that focus on the productivity-related topics that are most pressing to Cook Wealth, as well as private productivity coaching that helps new learning stick.

Also provided are guides, tips, and resources, along with virtual Q&A sessions for an additional layer of support.

To kick off the process, Marcey gave a Productivity Scorecard to each of Cook Wealth's employees to identify the areas they were struggling with most. Then, Jason and Sophie reviewed the workshop options and selected three topics that addressed their biggest needs: Communication; Meetings; and Time.

For the team workshop on communication, Marcey gave a presentation on inbox management that included practical strategies,

best practices, and action steps for organizing, processing, and responding to emails.

Jason said a lot of what Marcey shared were simple yet powerful tips that make a huge difference in avoiding inbox stress.

“There were many things we just hadn’t thought about before, like taking your first day back from vacation to focus exclusively on catching up on emails. She also coached us on how to organize our inbox and not use it as a holding ground or have a ton of sub-folders.”

Sophie noted Marcey also helped them shift their perspective around how to view the purpose of their inbox.

“We learned that your inbox isn’t just a hamster wheel where you’re in there running and running. We need to think of it as the place where we talk to clients, and a space that needs boundaries. **It was a helpful perspective shift that can stop your inbox from automatically triggering overwhelm.**”

Cook Wealth's second team workshop was on meetings – an area Jason said they needed major help with.



“We had a tendency to not only have too many meetings, but long meetings with no real agenda that everyone was invited to. It was so expensive. And we had so many meetings there was never any time to debrief or do actions we talked about doing.”

Throughout the workshop, **Marcey taught the team how to structure their meetings so that they’re efficient, productive, and actionable**, as well as helped them define a rubric and a matrix to identify when a meeting is truly necessary.

“That process alone was worth our investment in RaderCo,” Sophie said.

The third team workshop was on time, and Marcey helped the Cook Wealth team consider how they could better handle and prioritize their time so they could “work well, play more.”

They learned about how to set guardrails around their time, set up theme days, manage their calendar, and proactively plan their work and personal time.

“One of the biggest takeaways was identifying when we’re really at our best and planning our schedules so that we’re doing the right things at the right times,” Sophie said.



The three workshops – and the entire Team Training + Coaching process – has resulted in many shifts for members of Cook Wealth’s staff, but even more significantly, for the organization as whole.

One huge transformation has been in their meetings culture.

“We went from having so many pointless meetings to being very intentional with how and when we meet,” Jason said. “It’s freed up time and money to do fun things as a staff and enjoy each other more. The culture around here has definitely changed.”

Another major transformation has been in the way Cook Wealth has



restructured their in-office time to better support collaboration and focus.

“Our office has a lot of shared space, and Marcey shared research with us that communal space is actually not great for focus or productivity,” Sophie said. “So we created a structure where employees are grouped in pods, and each pod is in the office on certain days of the week.”

“It doesn’t preclude anyone from coming in, but it provides designated time for collaboration and also designated time where people can really focus when they need to,” Jason added.

Yet perhaps the most impactful shift of all are the parameters that have been set around the company’s “customer first” philosophy – a shift that was a direct result of Marcey’s team workshop on communication.

“It used to be the expectation that if a client emailed us after hours, we should respond,” Jason said. “After hearing Marcey’s presentation on communication, our CEO

said he would no longer check or process email after 5:30pm and he didn’t expect that we would either. It was a major shift, and he’s stuck to that for the most part.”

Cook Wealth is thrilled with the experience they’ve had with RaderCo’s Team Training, and while they’re just starting to develop and implement the new strategies and processes they’ve learned, **they love how it’s helped them showcase their values, both internally and externally.**

“We don’t want to be a company where our employees get on the hamster wheel every day for nine hours and just go go go,” Sophie said. “We want our team to have energy, the headspace to operate at their best, and job satisfaction. Marcey showed us the framework for how to create a work culture that cultivates that.

“I’m sure it’s been helpful in our recruiting and job interview conversations, too, because when candidates ask ‘What’s it like to

work here?' I can say that beyond unlimited PTO and parental leave, we have actual policies in place to protect our employees' wellness. **It's evidence of our real values."**

Both Jason and Sophie noted that any business would benefit from working with RaderCo, but that it can be an especially valuable investment for smaller companies – not only in their employees but in their ability to scale.

"The best part is the investment keeps going," Sophie said. **"We now have the resources and the policies that will keep providing return in the future.** We could've waited until we were bigger, but then we would've had a much bigger problem to fix.

"This investment has laid the groundwork for quicker and more successful scaling because now as we grow we can say, 'Welcome to Cook Wealth. This is how we do things.'" *

To learn how RaderCo's Team Training + Coaching can help you make an impactful investment that will benefit your entire team, visit helloraderco.com.

