

THE COCO WAY

STAY HUMAN

- We do not have pompous, condescending attitudes nor use complicated language, EVER.
- We're all human and strive to be friendly and communicative.
- We respect each team member's contributions and skills, listen and ask questions.
- We dress well, 'with intention' and 'with fun' but tied down by tradition or convention.
- We work to understand our clients and have personal conversations with them.

STAY FUN

- We celebrate 'wins' with cake, champagne, 'hi-fives' or photos.
- We adopt a friendly approach such as utilizing our caricatures regularly in emails and other correspondence.
- We send helpful, short financial updates using a light-hearted tone.
- We regularly make noise in the office and get to be music maestro for a day.

STAY SMART

- We schedule regular training to remain up to date for clients
- We maintain accurate records for clients by sending confirmation emails, and accumulating and filing their information appropriately.
- We provide better customer service by having regular daily and also weekly meetings to set tasks and schedule our days effectively.
- We all seek to deepen our knowledge of clients and record client information WHENEVER possible.

STAY REAL

- We are always open and honest with clients, whatever the issue.
- If errors are made, we call attention to them quickly so that they can be solved immediately.
- Our staff stay motivated as they are able to be open about their wants and needs and these are respected.

STAY PROFESSIONAL

- We work quickly to provide information that may help calm our clients' anxieties
- We prioritize difficult tasks
- We vent thoughtfully and are kind to each other.
- We are empowered to manage our time so as to be able to heighten our efficiency by regularly stepping back to gain a fresh perspective for our clients.