

BUSINESS OVERVIEW SNAPSHOT

This questionnaire is focused on identifying the big picture of your business and will give you important insight into building a purposeful business with clear direction.

BUSINESS VISION

- What is the magic #? (Desired ending value)
- What is the end game? (What drives you)
- Succession planning / exit strategies (sales, transaction, retirement)

BUSINESS STRUCTURE

- Lifestyle practice or value business
- Solo, silo or ensemble

BUSINESS STRATEGY

- Services offered
- Market position
- Client model

BUSINESS MODEL

- Account minimums
- Minimum / average account size
- Clients managed / managed by team

BUSINESS PLANNING

- Revenue / growth plans
- Economic model
- Team model

PERSONAL / PARTNER GOALS

- Personal income
- Time off
- Use of talent

BENCHMARKING

- Status Quo
 - Lack of business information
 - Historical view challenges ability to drive performance
- Perspectives
 - Advisors lack information infrastructure necessary to benchmark
 - Awareness of performance drivers improves performance
 - Top performance across all professions manage performance
- Best Practices: measure performance across business
 - Top line, bottom line and everything in between
 - Monitor performance on ongoing basis
 - Adjust business to achieve desired performance
 - Goals-based business management