

Fundamental 4

ARE YOU REACHING YOUR GOALS?

1ST QUARTER MILESTONE FOCUS DEADLINE March 31

Annual Budget and Operating Cost Analysis

Clean-up client segmentation

Refine client service matrix

2ND QUARTER MILESTONE FOCUS DEADLINE June 30

Update Website

Create Social Media strategy

Research / implement document mgt system - go paperless

3RD QUARTER MILESTONE FOCUS DEADLINE September 30

Research and implement new CRM system

Research and implement new portfolio management system

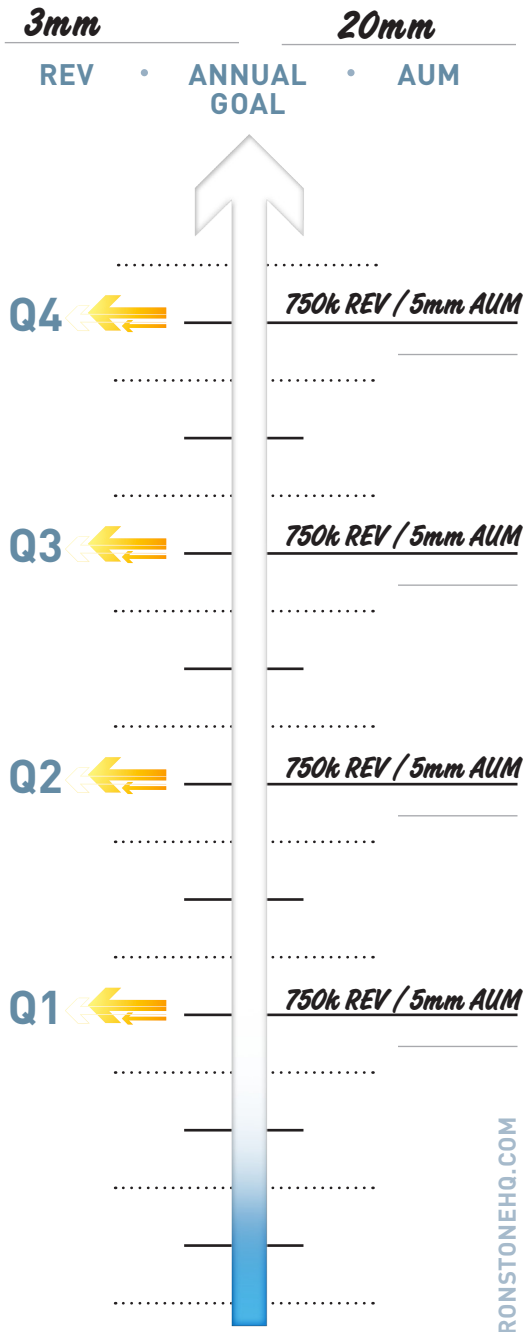
Begin brainstorming around succession planning

4TH QUARTER MILESTONE FOCUS DEADLINE December 30

Performance Reviews

2013 Annual Goal Planning - business plan

2013 Annual Marketing Plan



SolutionsStrategyResults

STRATEGIC PLANNING	BUSINESS DEVELOPMENT	OPERATIONAL EFFECTIVENESS	HUMAN ELEMENT
Business Model	Advisory Boards	Client Database	Communication
Business Plan	Branding & Value Proposition	Client Segmentation	Culture
Compensation	Capabilities Presentation	Existing Client Workflow	Hiring & Onboarding
Incentive Plan	Client Appreciation	New Client Workflow	Job Descriptions
Investment Model	Marketing Plan	Reports & Tracking Systems	Leadership
Operating Costs	Niche Marketing	Service Matrix	Organizational Skills
Strategic Alliances	Prospecting	Staff Meetings	Performance Evaluation
Succession Plan	Referral Network	Time Management	Team Development



IRONSTONE