

Strategic Planning	Business Development	Operational Effectiveness	Human Element
<ul style="list-style-type: none"> Business Plan Succession Plan Compensation Incentive Plan 	<ul style="list-style-type: none"> Branding & Value Proposition Niche Marketing Prospecting Referral Network Marketing Plan 	<ul style="list-style-type: none"> Client Segmentation Service Matrix New Client Onboarding Staff Meetings 	<ul style="list-style-type: none"> Job Descriptions Hiring & Onboarding Culture Career Path Performance Feedback
<ul style="list-style-type: none"> Business Model Investment Model Operating Costs Peer Alliances 	<ul style="list-style-type: none"> Client Advisory Board Client Appreciation Sales Effectiveness 	<ul style="list-style-type: none"> Technology Existing Client Workflow Reports & Tracking Systems Time Management 	<ul style="list-style-type: none"> Communication Culture Leadership Team Development