

Leadership Excellence

Exercise 11: Implementation and impact report

This tool combines the critical activities within each room we believe are necessary to fully implement the previous steps and the actual impact that implementation has on your bottom-line results. Know that the key performance indicators should be identified in an effort to help ensure that your business is operating at the level you expect and/or aspire it to be.

New Business Development Room

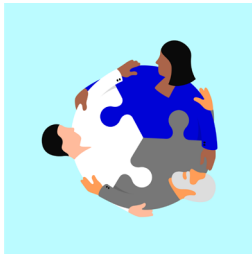


Examples:

- Net new revenue
- New clients from client referrals
- New clients from COIs
- Number of referrals received

Create your own:

Client Service Room

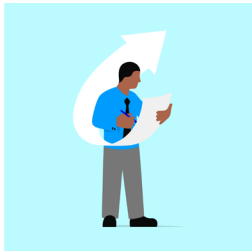


Examples:

- % of Platinum Clients with review last 90 days
- Average number of proactive, structured contacts per client
- Percentage of clients to have review meeting with tax/estate professional
- Organic growth of existing clients

Create your own:

Wealth Management Room



Examples:

- % clients w/financial plan
- % Clients in model portfolios
- % Clients with executed wealth management checklist
- % of fee-based revenue

Create your own:

Practice Management Room



Examples:

- # of team members with a development plan
- % tasks documented within CRM with role assignment
- Business continuation/succession identified
- Introductions of team members to legacy relationships

Create your own:

COIs = centers of influence, CRM = customer relationship management, Platinum clients = top 10% clients ranked qualitatively and quantitatively. Examples are fictional and are shown for illustrative purposes only.

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