

01 KICK-OFF
Meet with key leaders to review process, identify goals and challenges, and set a schedule

02 DATA COLLECTION
Gather info on financials, operations, organizational structure, marketing, BD, recruiting and retention, etc.

CLIENT SURVEYS
Conduct surveys to identify areas for improvement and differentiators from clients' perspective

03

05 EMPLOYEE SURVEY
Assess team key motivators, leadership, and future vision.

COMPETITIVE ANALYSIS
Review competitors to gauge service viability, marketing effectiveness, identify threats/gaps, establish benchmarks, etc.

04

06 LEADERSHIP ASSESSMENT
Identify alignment opportunities, roadblocks, challenges, and help leaders leverage dominant strengths

VISIONING SESSION
Guide leadership to define a 3-year vision road map with key objectives based on research and discussion

07

EXAMINE
FINDINGS TO
SET GOALS
& OBJECTIVES

DEVELOP A
SCORECARD
TO ACHIEVING
YOUR VISION

PLAN TASKS,
TIMELINE,
INITIATIVES,
TEAMS & KPIS

ADDRESS
OPPORTUNITIES,
CHALLENGES
& OBSTACLES

08 REPORT
A Vision Action Plan Report includes vision, objectives, tactics, KPIs and an accountability and tracking worksheet

ACCOUNTABILITY
Quarterly visioning sessions ensure the firm is on track and implementing the action plan

09