

LATEST TRENDS IN IMPROVING OPERATIONS





GOAL TRENDS:

TO INCREASE

PROFITS

ENJOYMENT

FREE TIME



IDEOS™ IMPROVEMENT TRENDS

I = INTEGRATE the tech

D = DELEGATE the work

E = ELIMINATE the work

O=OUTSOURCE the work

S=STAFF restructure and up-skill

INTEGRATE THE TECH



DELEGATE THE WORK



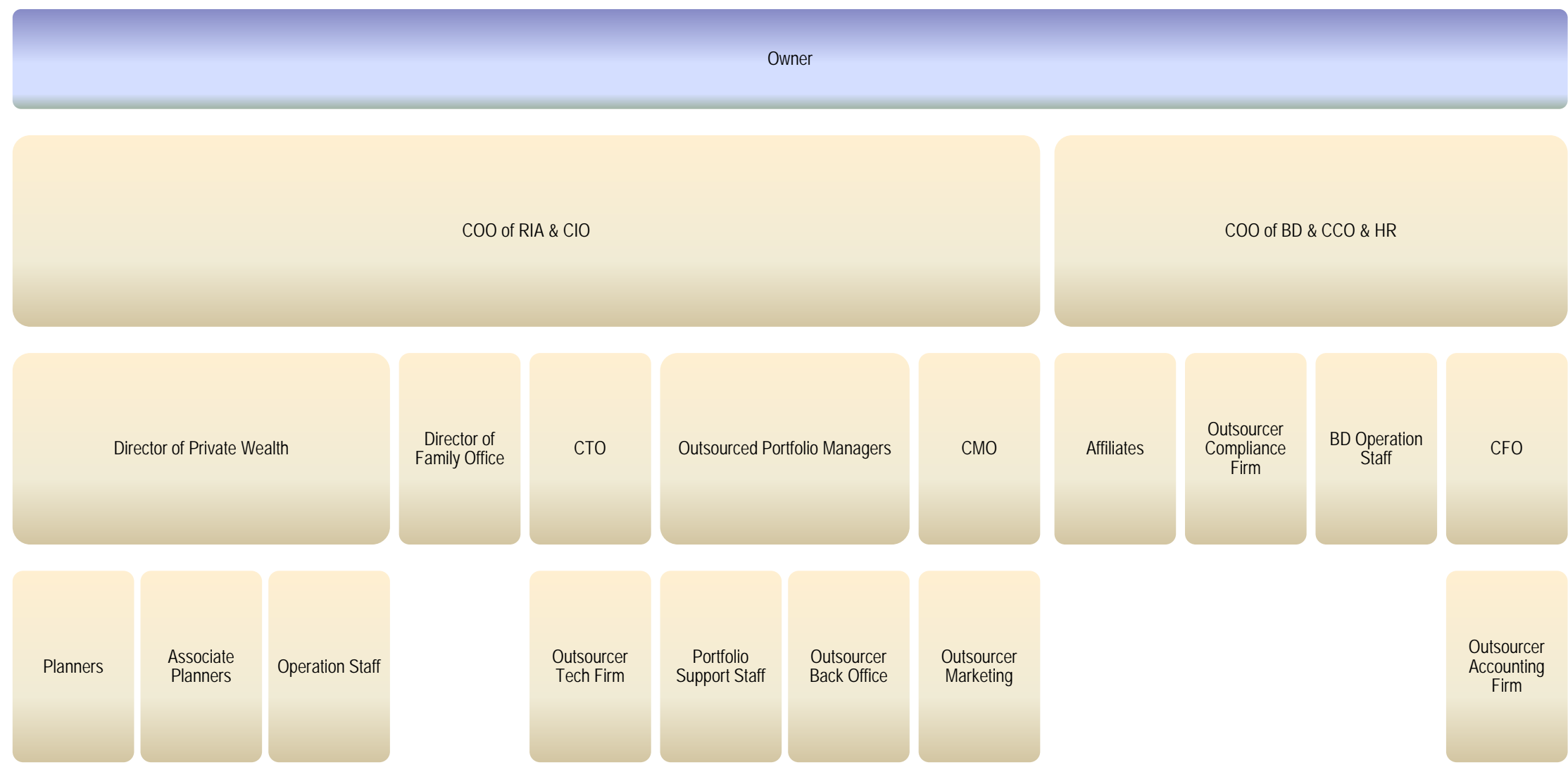
PERSON DOING WORK	BEFORE 5 steps
ADVISOR	TELLS ADMIN TO SCHEDULE CLIENT REVIEW MEETING
ADMIN	CALLS THE CLIENT AND LEAVES A VOICEMAIL
CLIENT	CALLS THE ADMIN AND CHOOSES DAY/TIME THAT DOESN'T WORK FOR THE ADVISOR; ADMIN PROVIDES NEW SET OF DAYS/TIMES
ADMIN	CALLS or EMAILS THE CLIENT AS HASN'T HEARD BACK FROM THE CLIENT; PROVIDES 3 TIME SLOTS
ADMIN	PLACES THE 3 TIME SLOTS ON THE CALENDAR AS TENTATIVE AND WAITS FOR CLIENT'S RESPONSE
CLIENT	RESPONDS WITH CONFIRMATION OF TIME OF THE MEETING
ADMIN	CALLS 2 DAYS BEFORE THE MEETING TO REMIND THE CLIENT OF THE MEETING

PERSON DOING WORK	AFTER 1 step
SOFTWARE	NOTIFIES ADMIN TO SCHEDULE THE MEETING
ADMIN	EMAILS THE CLIENT WITH SCHEDULING LINK
CLIENT	SCHEDULES THE MEETING; AUTOMATICALLY SHOWS ON ADVISOR'S CALENDAR and EMAIL NOTIFIES THE STAFF
SOFTWARE	AUTO EMAIL REMINDER SENT TO CLIENT 2 DAYS BEFORE THE MEETING

OUTSOURCE WORK TO EXPERT OUTSOURCERS LOCATED IN THE USA



RESTRUCTURE THE TEAM



TASK	Main Doer THEN	Main Doer NOW	Time & \$ Saved
Schedule a meeting	Advisor & Admin	Time Scheduler	4 hours/week \$15,652/yr
Prep 12 financial plans a year	Planner	CRM Planning Integration	4 hours per plan \$1,010/year
Investment Reconciliation & Reporting	Investment staff or Advisor	Outsourcer	30+ hrs per qtr \$5,000+/yr
Capture 50 meetings per year	Advisor & Planner	Dictation software	1 hour per meeting \$12,500/yr
Time Tracking	Everyone	Software with auto-prompts	Priceless
3 person firm saving & sharing documents	Everyone, Adobe & Email	Doc management system & Office integrations	6.5 hrs/week/staff \$21,294/year

Businesses are assessing their operations one process at a time

THE WORK	Integrate	Delegate to staff	Eliminate	Outsource	I need to do
Compliance					
Forms/Applications					
Investment Mgmt					
Investment Reporting					
Financial Planning					
Phones/ Scheduling					
Client Meetings					
Drip Marketing					
Co Financials/ Billing					



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