

# The Efficiency Optimizer Solution

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## REVIEW OF CURRENT SYSTEMS

We will review your current systems and processes. This will help identify gaps in your systems and areas for improvement.

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## CLIENT ADVISORY BOARD (CAB)

We provide a turnkey process with email invites, scripts, and an agenda. Your clients will identify what areas provide the most value and what areas provide less. This creates a framework for change, removing the guesswork.

3

## PROCESS REVIEW

We will shadow your staff to time processes, record steps of your processes, and identify potential bottlenecks and inefficiencies.

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## MEETING OBSERVATION

We will shadow an advisor to better understand how meeting preparation and follow ups are done. We will also review how they delegate to staff.

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## TEAM INTERVIEWS

We will interview staff to see where they think efficiencies could be improved.

6

## FRICTION POINTS

We will determine where expectations are misaligned or where processes are not being implemented. This is based on feedback from your clients in the CAB, feedback from your staff, and observing an advisor's workflow.

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## INEFFICIENCY ASSESSMENT

We will identify inefficiencies in your process and systems. This will help quantify time that could potentially be saved.

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## IDENTIFY THE AREAS TO BE IMPROVED

Specific areas for improvement will be identified. This may include communication, delegation, systems, and processes.

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## RECOMMENDATIONS REVIEW

Discuss the proposal with decisions makers and determine best method for implementation.

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## IMPLEMENTATION

We will lay out an action plan with specific steps, individual responsibilities, due dates, and success benchmarks. We will use a validated assessment tool to show you how to effectively engage, train, and execute the action items.

Cost