

Ready-Set-Go!

Creating Brand Loyalty & Other Benefits

Having a Procedures Manual allows the team to deliver an overall client experience that will create exceptional branding. This consistency not only helps to keep top clients, but also attracts more of them. It will help you smoothly run the business with reduced stress and allow for seamless transition when realigning responsibilities and/or adding new individuals to the team.

The Procedures Manual has been known to be a lifesaver in times when team members are away for any length of time, planned or otherwise. It is also a boon to compliance - having documented processes can ensure you are compliant in all areas of your practice. This is a good thing.

We are currently on the cusp of significant business succession where many advisors will be selling their business and reaping the rewards of their hard work in the form of stellar retirement. Regardless of which side you are on (the one retiring *or* the one acquiring their clients), the Procedures Manual will go a long way to keeping things on track during this transition. If you happen to be the one retiring, having your business systematized and documented will make it more attractive to the marketplace. If you are the one looking to acquire a business being sold, you may be one of several advisors vying for the practice. The fact that you are organized and have a Procedures Manual may be exactly the comfort the retiring advisor is looking for...making you the successor.



Making It a Reality

Advisory Teams will:

- Achieve Quality Control
- Project Exceptional Branding
- Increase the Value of their Practice
- Be Compliant
- Be Prepared for Team Changes
- Be Scalable & Ready to Grow
- Sleep Better at Night