

Big Levers

This business levers checklist will help you get clear on your upcoming priorities. Place a check beside the action items you would like to focus on for the next quarter.



MINDSET:

- Elevate my beliefs, thinking and self-talk
- Use my Success Shifter or journal to chart improvements to my habits
- Draw my future and identify 3 bold steps



PRODUCTIVITY:

- Stop wasting my time; get a system for managing my time
- Implement Client Surges
- Hire to focus on Genius Work
 - Virtual Assistant, P/T (2-5 hrs wk as start)
 - Trusted Assistant (staff of 1)
 - Client Service Assistant
 - ParaPlanner
 - Service Advisor
 - Manager/COO
 - Personal Assistant



FEES:

- Stop compromising; set and stick to minimums
- Know my value, raise AUM and/or planning fees
- Know my value, start charging planning fees
- Stop doing free work for clients (at least charge hourly)
- Transition/sell unprofitable or not-right clients



CLIENT SERVICES:

- Build a Client Service Model/Schedule
- Implement use of the One Page Financial Plan
- Structure meetings around 45- or 75-Minute Meeting Model
- Create an "amazing first meeting" process



OPERATIONS:

- Standardize processes and procedures
- Automate work flows
- Build my prospect process
- Design my client onboarding process
- Update tech stack
- Draft work flows for (key process)



GROWTH:

- Build a Marketing Action Plan
- Drive growth through COIs
- Drive growth with digital marketing
- Drive growth with referrals / SOW
- Build a prospect process that retains the right clients consistently
- Build online sales funnel / prospect process
- Build branding and messaging
- Narrow and market to my niche
- Conduct a website audit & outsource to solve issues



PLANNING & PERFORMANCE:

- Build a firm business development strategy
- Drive short-term growth
- Develop a strategic planning and quarterly review process
- Implement weekly team meetings

Pick your top three to focus on this year:

1.

2.

3.