

Fundamental 4™

Strategic Planning

Business Plan

Succession Plan

Compensation

Incentive Plan

Business Model

Investment Model

Operating Costs

Peer Alliances

Business Development

Branding & Value Proposition

Niche Marketing

Prospecting

Referral Network

Marketing Plan

Client Advisory Board

Client Appreciation

Sales Effectiveness

Operational Effectiveness

Client Segmentation

Service Matrix

New Client Onboarding

Staff Meetings

Technology

Existing
Client Workflow

Reports & Tracking
Systems

Time Management

Human Element

Job Descriptions

Hiring & Onboarding Culture

Career Path

Performance Feedback

Communication

Culture

Leadership

Team Development