

Annual PSA 1 Foundations Check Up



A simple guide to plan for continued success.

Pillar 1: Your Practice

- ☒ Your Ideal Life has been revisited and updated
- ☒ Structure related to branding & marketing is intake and actively being worked upon
 - ☐ Review Introduction Kit
 - ☐ Update and clean-up website and all marketing-related online resources
- ☒ Ensure team shared documents are cohesive and up to date
 - ☐ The team share drive is organized and updated with the newest material
 - ☐ Outgoing emails are cohesive throughout the team (email signature, etc.)
 - ☐ CRM is fully integrated and consistently utilized
 - ☐ Maximizer Views & Action Plans are being used and updated
- ☒ Social Media is being used in a beneficial and appropriate way
- ☒ Firm grasp of your online footprint and how you appear on social media

Goals & Action Items:



Pillar 2: Your Clients

- Your Client Experience is reviewed and improved upon
 - Cards & Gifts are being utilized to enhance the client's experience
 - All resources are being used wisely and productively to increase brand loyalty
- All client events remain organized and thoroughly thought out
- All client events are planned with a similar method to ensure cohesiveness and reliability between all client events
- Events are chosen based on client profiles and client demand
- The Personal Financial Organizer is being utilized and improved upon
 - PFO's have been updated and kept organized/up to date
- The introduction process has been utilized and improved upon
 - All introduction scripts are updated and consistently used

Goals & Action Items:



Pillar 3: Your Team & Affiliates

- Review your **Advisory Blueprint** and make any necessary updates
- Utilize the Time Assessment Worksheet to be aware of your team time management and identify opportunities to reassign, reduce, and remove.
- Utilize your team meetings to ensure team productivity and understanding
 - The Annual Strategic Planning Session
 - The Quarterly Strategic Team Meeting
 - The Weekly Team Meeting
- Be prepared for any team meeting and utilize team meeting Agendas
- Make all meetings fun and exciting to ensure team engagement throughout
- Identify current strategic partners
 - Proactively service your strategic partners to ensure relationship longevity
- Identify required strategic partners *need* to add to your network
- Identify required strategic partners *want* to add to your network
 - Follow the professional process for finding and connecting with possible strategic partners
 - Ensure all possible strategic partners are a good fit before adding them to your network
- Allocate your time wisely to ensure growth of your business

Goals & Action Items:

