

## Q1 Milestone Focus

DEADLINE  
3/31

Annual budget and operating cost analysis

Clean-up client segmentation

Refine client service matrix

## Q2 Milestone Focus

DEADLINE  
6/30

Update website

Create social media strategy

Research / implement document mgt system

## Q3 Milestone Focus

DEADLINE  
9/30

Research and implement new CRM system

Research and implement new portfolio management system

Begin brainstorming succession planning

## Q4 Milestone Focus

DEADLINE  
12/31

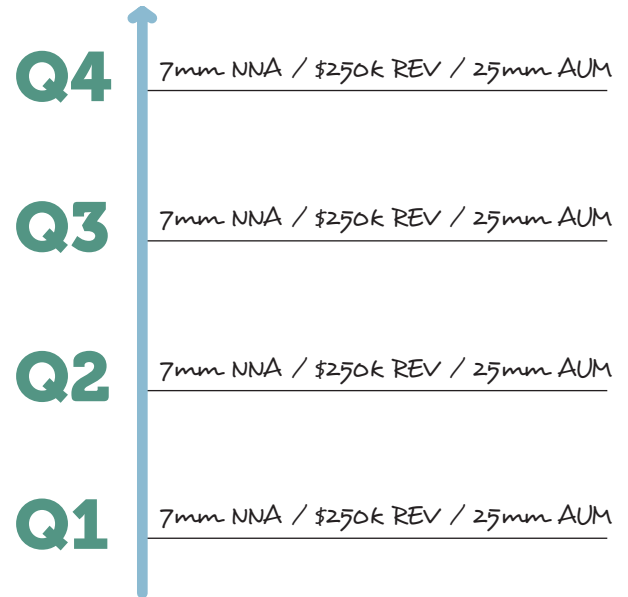
Performance reviews

Annual goal planning / business plan

Annual marketing plan

## Annual Goal

NNA > REV > AUM  
\$28M > \$1M > \$100K



## 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 Boards  
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