Vision Settings

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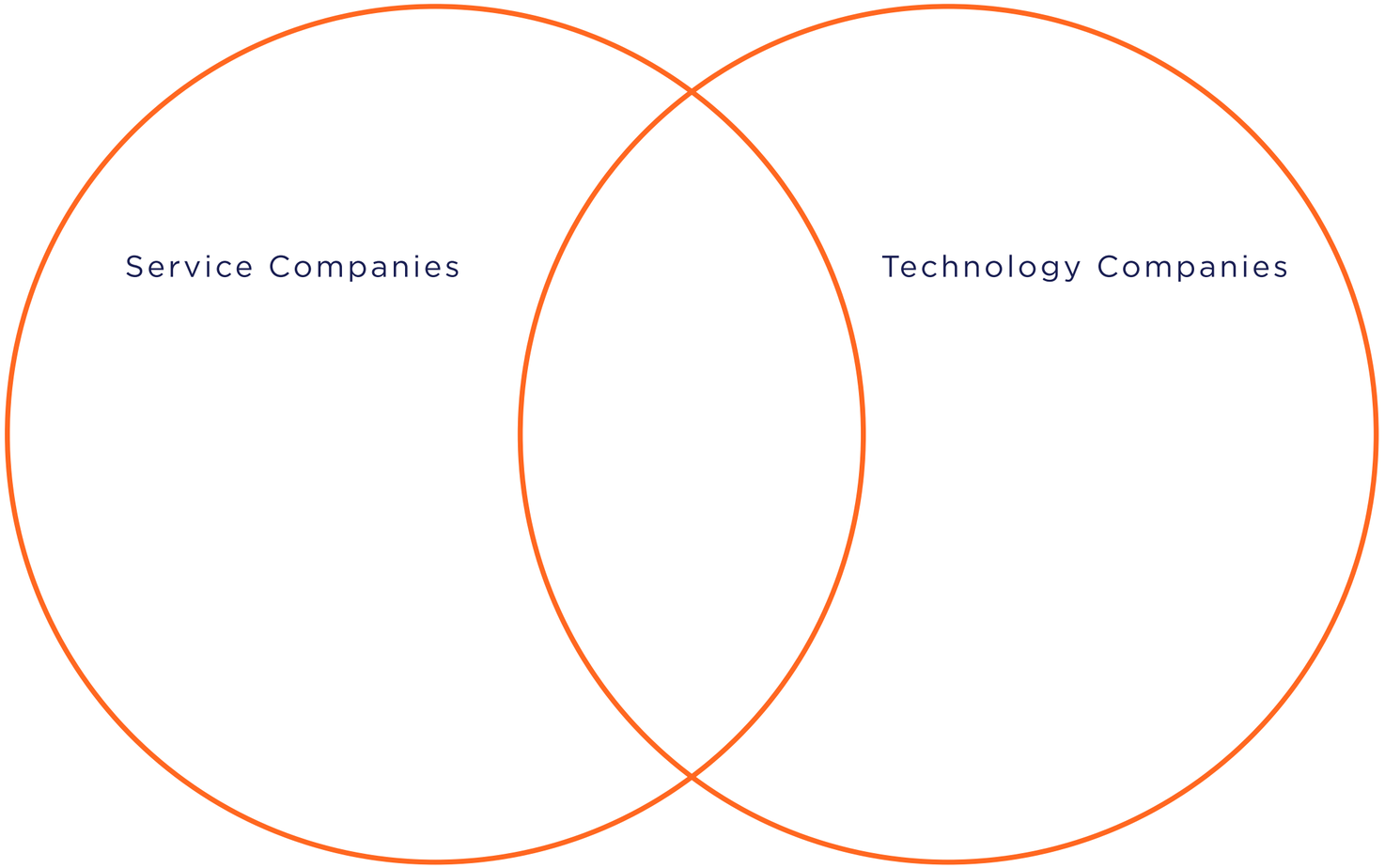
Key Traits

- What are the key traits of the service companies you admire?
- What are the key traits of the technology companies you admire?



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Key Mindsets

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Process is Your Intellectual Property

Most Every Client Problem Can Be Marketed

Productize Your Services

Good Marketing is Always Teaching

Repeatable Is Undefeatable

"When you think about your goals, don't just consider the outcome you want. Focus on the repetitions that lead to that place. Focus on the piles of work that come before the success."James Clear

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Milemarker Tech Inventory

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SYSTEM	FUNCTION	USERS	ANNUAL COST	UTILIZATION	OVERALL SATISFACTION
				☆☆☆☆☆	☆☆☆☆☆
				☆☆☆☆☆	☆☆☆☆☆
				☆☆☆☆☆	☆☆☆☆☆
				☆☆☆☆☆	☆☆☆☆☆
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				☆☆☆☆☆	☆☆☆☆☆

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Data, Dashboards, Decisions

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Who are all of your customers?

Internal

External

Third-Party

Other

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Data, Dashboards, Decisions

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What are the most important pieces of data that impact their experience?

Internal

External

Third-Party

Other

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Data, Dashboards, Decisions

How do you capture that information today?

What are the most meaningful KPI’s for your organization?

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Where Work Happens

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What are the most important workflows to your organization's success?

01 Marketing

02 Sales

03 Onboarding

04 Account Opening

05 Trading

06 Financial Planning

07 Billing

08 Secondary Services

09 Referrals

10 Annual Meeting

11 Cancellation

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Where Work Happens

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How do your workflows get accomplished today?

WORKFLOW	CATEGORY	MANUAL OR AUTOMATED	METHOD OF COMPLETION	EASE OF ACCOMPLISHMENT
			e.g, email, phone, crm	1 being easy, 5 being difficult

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Where Work Happens

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What companies have shown you what not to do with their workflows?

What companies or organizations have the best workflows you experience today?

BAD EXPERIENCES

VS

GOOD EXPERIENCES

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