

Practice Optimization Check In

Give yourself 1 point for each core process that is written down and you follow regularly.

Core Process Checklist	Yes	No
Ongoing business assessment		
Business goals (including mission & vision)		
Business development plan		
Introduction/Referral strategies		
COI strategies		
New client on-boarding process		
Client segmentation & client contact strategy		
Client review process		
Financial planning / asset management process		
Client retention strategy (loyalty & engagement)		
Team roles & responsibilities		

How confident would you feel if you could answer “yes” to all of the above?