
Transform your Business Using Processes People and Technology



Who am I and you

Why are we here

What are the benefits of transforming

What are examples of transformations

How can you experience those benefits

WHO

WHO am I?

I am an addict of deliberate transformations, a product of failures and successes, and a believer that tech supports your ability to achieve your goals

WHO are you?

WHY ARE YOU HERE?

SOS



WHICH ONE?



MY WHY



BENEFITS OF TRANSFORMATION



Reclaim time

Profitability

Enjoyment

Clarity

Growth

















BENEFIT OF TRANSFORMING A PROCESS

Reclaim time

Clarity

Growth without the work

HOW TO TRANSFORM A PROCESS

Print client and risk questionnaire and mail with return envelope	
Email or call client to ask for completed forms	
Type client data into CRM	
Type client data into Wealthscape	
Type client data into planning software	
Create folder and sub folders on server	
Scan questionnaire and statements into folder on server	
Create labeled folder, insert statements & questionnaires, file in cabinet	
Fill out spreadsheet with list of accounts to open (determined during conversation with advisor)	
Log into Wealthscape, create applications, print, mail with return envelope	
Email or call client to ask for completed forms	
Scan forms onto server, upload to Wealthscape, place in folder in cabinet	
Log into Wealthscape to confirm forms received and processed	
Type client data into portfolio system, link new accounts to household, billing grid, advisor payout, model	



Discuss ideas that could eliminate 12 minutes of work

BENEFITS OF TRANSFORMING THE PEOPLE



HAPPY STAFF

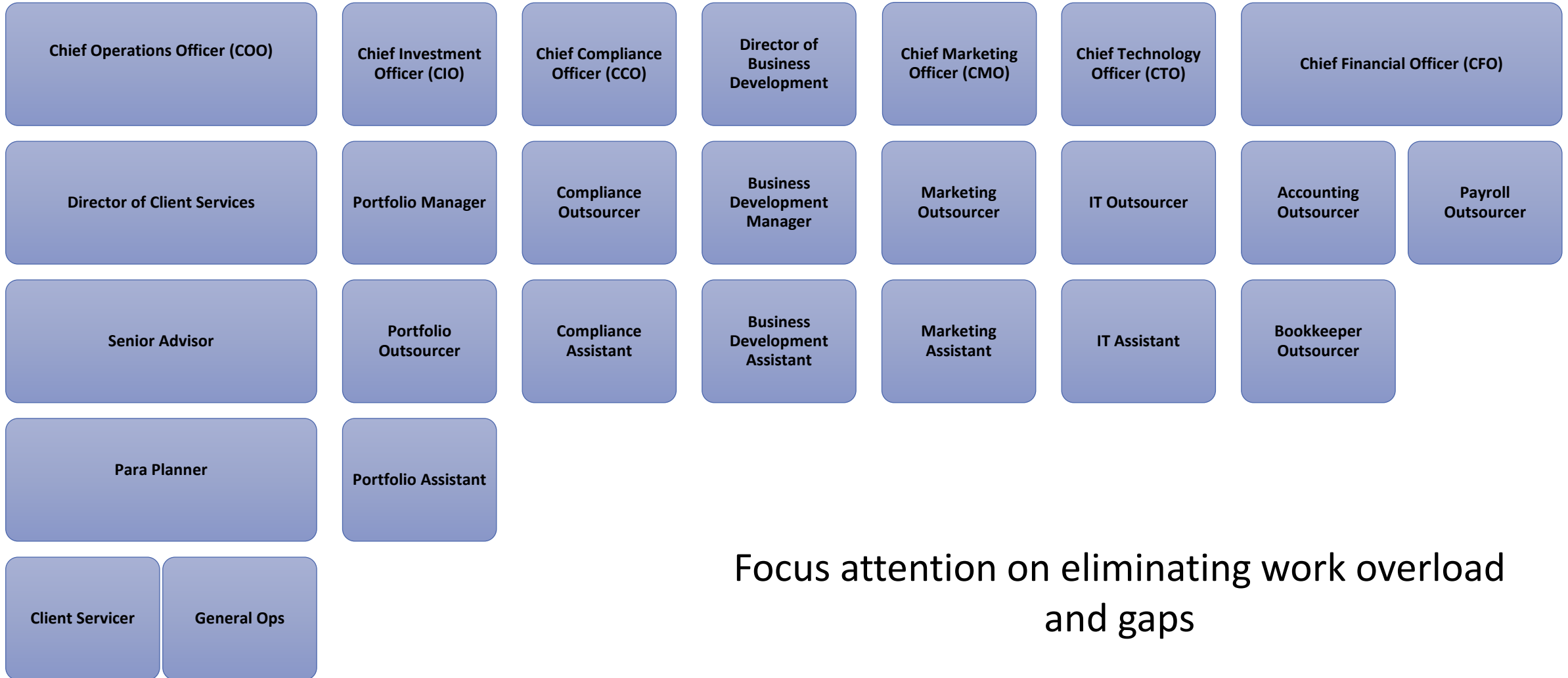


BETTER WORKPLACE



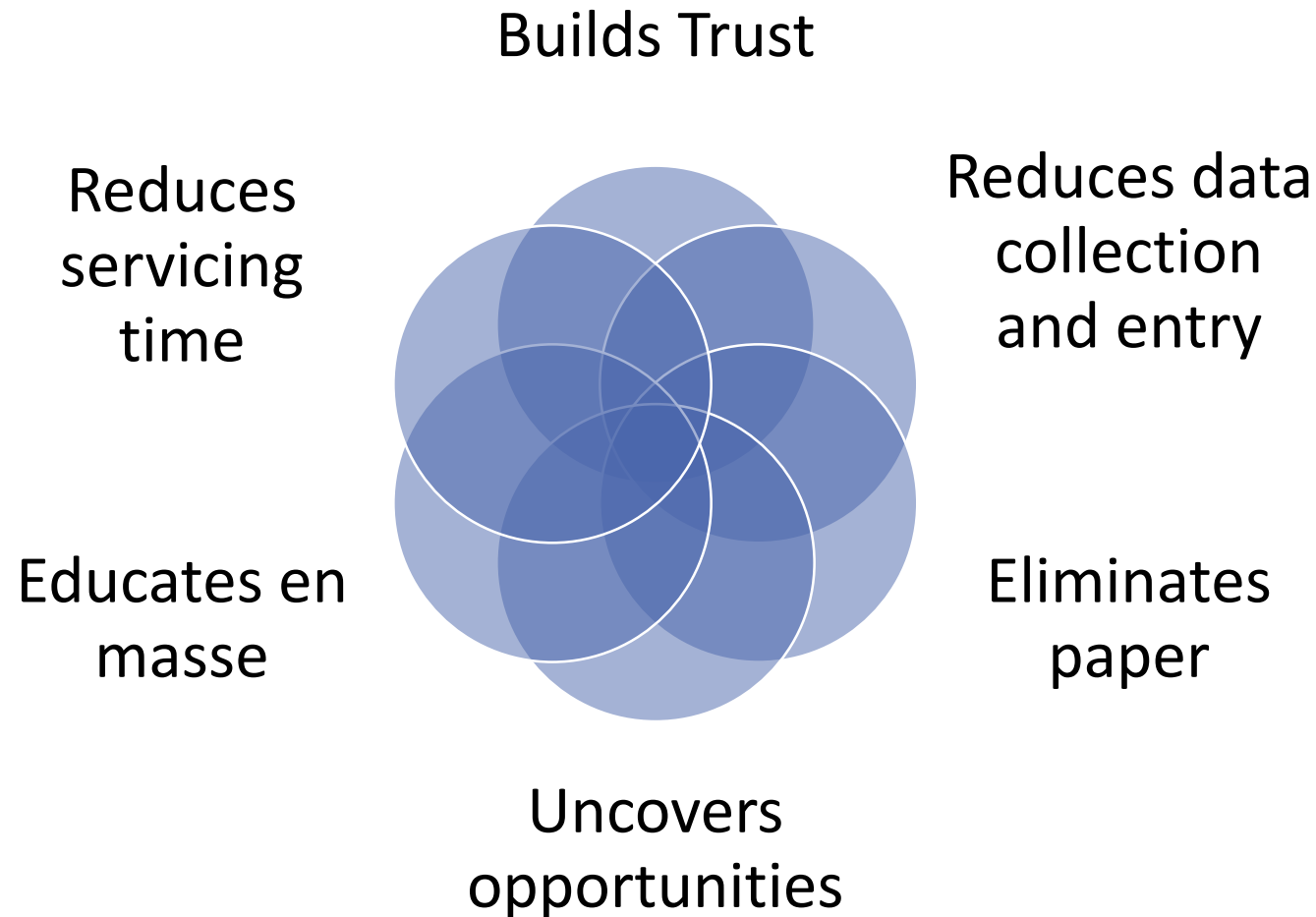
ATTRACT MORE CLIENTS AND
GREAT NEW HIRES

HOW TO TRANSFORM THE PEOPLE

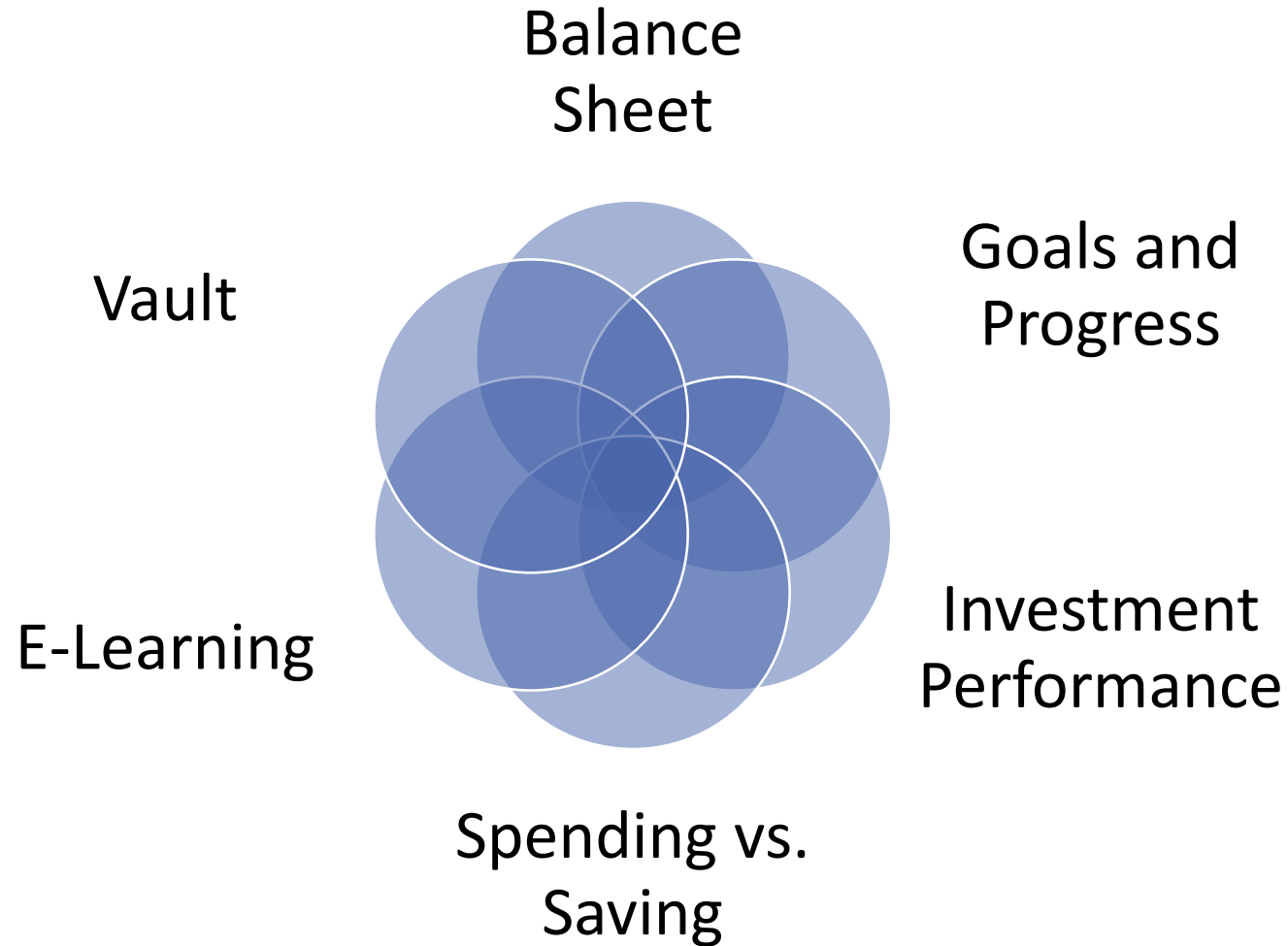


Focus attention on eliminating work overload and gaps

BENEFITS OF TRANSFORMATIVE TECH



HOW TO IDENTIFY TRANSFORMATIVE TECH



HOW DO WE TRANSFORM?

Learn the language

Go to Stanford University

Identify Work Overload

Ideate and Test

Implement with the Benefits top of mind

WE LEARN THE LANGUAGE

in·no·vate

verb

make changes in something established, especially by introducing new methods, ideas, or products



trans·form

verb

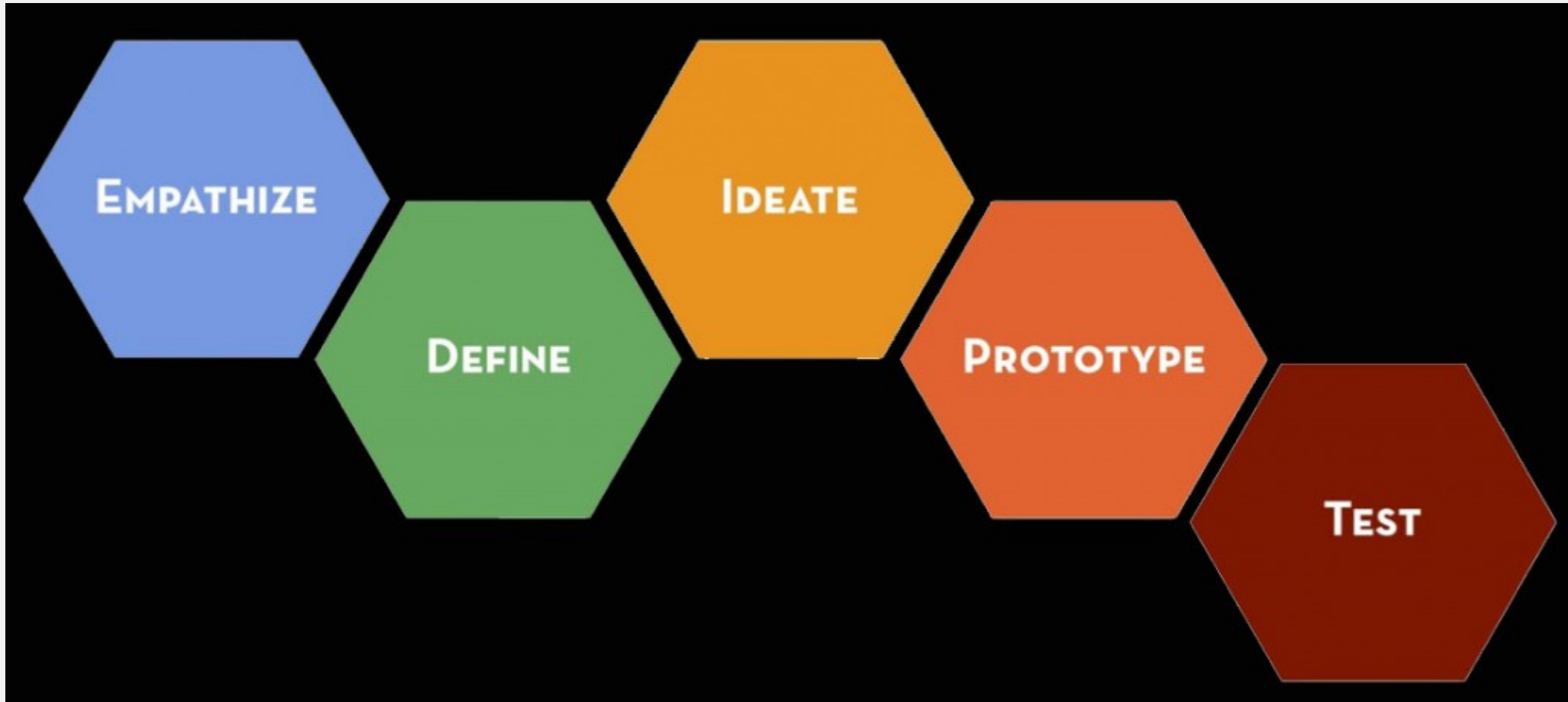
make a thorough change in the form, appearance, or character of

change

~~verb~~

make or become different

WE ADOPT THE STANFORD WAY OF THINKING



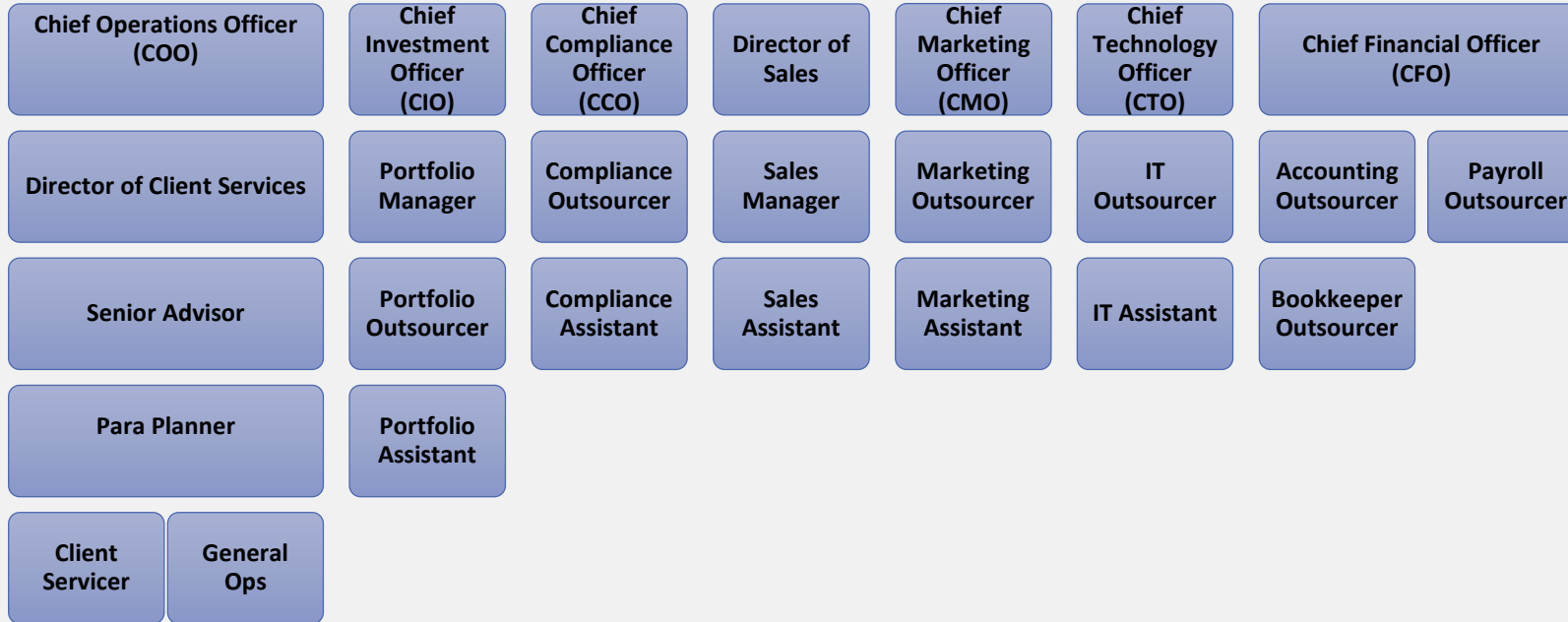
Stanford University © 2017

WE IDENTIFY WORK OVERLOAD and GAPS



Focus your attention on transforming to reduce overload and gaps

WE IDENTIFY WORK OVERLOAD and GAPS

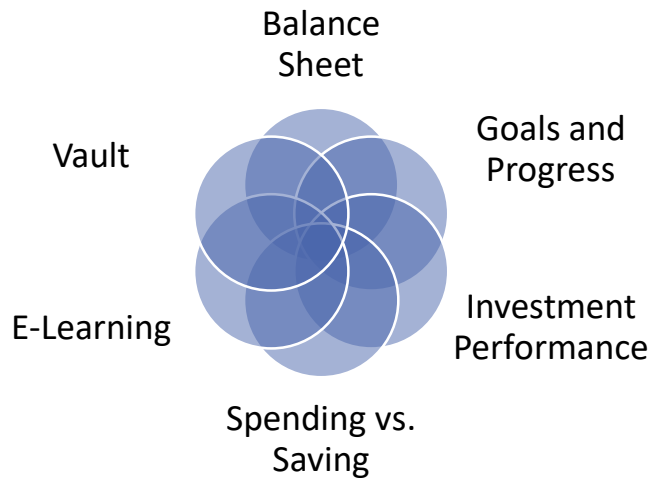


EXERCISE WITH AUDIENCE















WE IDEATE & TEST POSSIBLE SOLUTIONS



Print client and risk questionnaire and mail with return envelope	
Email or call client to ask for completed forms	Outlook
Type client data into CRM	
Type client data into Wealthscape	
Type client data into planning software	
Create folder and sub folders on server	
Scan questionnaire and statements into folder on server	
Create labeled folder, insert statements & questionnaires, file in cabinet	
Fill out spreadsheet with list of accounts to open (determined during conversation with advisor)	
Log into Wealthscape, create applications, print, mail with return envelope	
Email or call client to ask for completed forms	Outlook
Scan forms onto server, upload to Wealthscape, place in folder in cabinet	
Log into Wealthscape to confirm forms received and processed	
Type client data into portfolio system, link new accounts to household, billing grid, advisor payout, model	



HOW TO TRANSFORM A PROCESS

Print client and risk questionnaire and mail with return envelope	
Email or call client to ask for completed forms	
Type client data into CRM	
Type client data into Wealthscape	
Type client data into planning software	
Create folder and sub folders on server	
Scan questionnaire and statements into folder on server	
Create labeled folder, insert statements & questionnaires, file in cabinet	
Fill out spreadsheet with list of accounts to open (determined during conversation with advisor)	
Log into Wealthscape, create applications, print, mail with return envelope	
Email or call client to ask for completed forms	
Scan forms onto server, upload to Wealthscape, place in folder in cabinet	
Log into Wealthscape to confirm forms received and processed	
Type client data into portfolio system, link new accounts to household, billing grid, advisor payout, model	



AUDIENCE EXERCISE

CHOOSE 2 VOLUNTEERS TO WIPEBOARD
THEIR PROCESS ON WIPE BOARDS/ POST IT
POSTER PAPER

I REVIEW THEM OUT LOUD

AS AUDIENCE WE DISCUSS IDEAS THAT
COULD ELIMINATE 12 MINUTES OF WORK



WE LEAD OUR TEAM TO IMPLEMENT



The way to get started is to quit talking and begin doing.

Walt Disney

Who – Business Owners

Why – SOS

Benefits of Transforming – Clarity, Enjoyment, Profitability

Examples of transformations – Process, Roles, PFM

How – Jargon, Stanford, Ideate, Test and Lead with benefits

WE CELEBRATE OUR TRANSFORMATION



*Change is
inevitable –
progress is
optional.*

*Tony
Robbins*