

PERFORMANCE OPTIMIZATION

For those who want to do more than get by



KICK-OFF

- Project Overview: Kick-off call and scope presentation, goal and expectation setting
- Timeline and Communication Protocol: Project duration, milestones and check-in call schedule definition

RESULT:

Defined project roles and responsibilities

DISCOVERY

- Financial Information Request: Timekeeper reports, employee statistics, origination and client information, financial statements
- Operations and Strategy Surveys: Operations and strategic goals & expectations questionnaires

RESULT:

A comprehensive data set for the analysis

ASSESSMENT/ANALYSIS

- Financial Analysis: Assessing the financial health of the firm and timekeeper/ revenue-generator economic performance
- Operations Assessment: Assessing the firm's performance in operational functions, including marketing, accounting, management, HR, employee performance, etc.
- Strategic Assessment: Assessing competitive factors, trends, strengths, and challenges
- Follow-Up Interviews: In-depth discussions with key individuals regarding financial and operational performance, as well as future goals

RESULT:

A thorough assessment of the firm's financial and operational performance

STRATEGIC MAP

- Institutional Definition: vision, mission, values, and expectations
- Strategy Map: A map of the firm's desired outcomes for a defined period of time (3, 5, 10 years)
- Financial Model: Financial plan that includes recommendations for billable hours/billable work, rates, compensation and incentives, overhead expenses
- Adjustments to management systems and processes, including information technology needs
- Strategic Assumptions and Financial Model Test: Translate strategic goals into actionable recommendations under consideration of financial factors (fee income, expenses, and profit)

RESULT:

Recommended strategic moves that make sense

DELIVERABLES

- Follow-Up Interviews: In-depth discussions with key individuals regarding financial and operational performance, as well as future goals
- Strategy Map: A graphical map of each component of the process: the important priorities and action plan, and high-level supporting analysis
- Project Plan: Task lists, milestones, schedules, and responsibilities for strategy implementation

RESULT:

A roadmap to continue prosperity

IMPLEMENTATION AND ONGOING MANAGEMENT

(PRICED SEPARATELY)

- Project Management: Execution of the strategic plan
- Ongoing Management Support: Continuous financial and operational management support

RESULT:

Expert guidance for strategic and day-to-day firm management