Review

• No standard on-boarding process
• Initial Questionnaire
  – Start 60%
  – Now 100%
• NIGO Apps
  – Start 50%
  – Now 14%
• Lead Time
  – Start 51 Days
  – Now 25 Days
Big Wins!!!!

• Forced Cross Training
• Leveled work with Virtual Assistant
  – Solve 360
  – Ruby Receptionist
• No replacement of FTE
  – Approx. $35,000 annual savings
Title: FILLING THE PIPELINE
Date: 11/30/2012

Problem Statement: As our stabilized on-boarding process has created flow, we are struggling to fill the pipeline to utilize each FTE and increase revenue.

**Current State:**

```
Prospect
```

```
Follow Up
\[ \Delta = 3 \]
\[ P/T = 30M \]
\[ \Theta = 0.25 \]
1 Day
```

```
Intra-Clue
\[ \Delta = 3 \]
\[ \Theta = 0.5 \]
7D
```

```
Budget & P&L
\[ \Theta = 1.05 \]
\[ P/T = 300M \]
```

```
Planning
\[ \Theta = 0.25 \]
\[ P/T = 75M \]
```

```
TDA
\[ \Delta = 3 \]
```

```
IGO Client
```

```
WAITING!
```

```
1D
```

```
30M
```

```
7D
```

```
90M
```

```
7D
```

```
300M
```

```
7D
```

```
15M
```

```
8H
```

**Goals:**

- 10 NEW PROSPECTS / WEEK
- 40% CLOSE RATE

10/Week \Rightarrow 4/Week \Rightarrow \uparrow \$150% YOY

Prospects \Rightarrow Clients
**Name:** Darren Harp  
**Coach:** Kent Sears

**Analysis:** Employee Workshop

- Fee Schedule = 😞
- Who are we?
- Who do we serve?
- Standard Offer?
- Prospecting strategy?

**Countermeasures:**

<table>
<thead>
<tr>
<th>Waste</th>
<th>Root Cause</th>
<th>CM</th>
<th>Owner</th>
<th>End of Q3 Q4 Q1 Q2 2013</th>
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<tbody>
<tr>
<td>Re-work</td>
<td>Fee Schedule</td>
<td>New Fee Schedule</td>
<td>DH</td>
<td>Completed ADV Update 9/5/1</td>
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<td></td>
<td>- Training</td>
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<tr>
<td>Re-work</td>
<td>Standard offer</td>
<td>Retainer</td>
<td>DH+DK</td>
<td>Completed 8/31/2012</td>
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<td>Standard Work</td>
<td>DH</td>
<td>Set Standard Contact Req:</td>
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<td></td>
<td>COE Solicitor Model</td>
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<td>Recruit &amp; Train Solicitors</td>
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<tr>
<td>Waiting</td>
<td>No Message</td>
<td>Mkt. Plan</td>
<td>DH+DK</td>
<td>Real Art Engagement</td>
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<td>Public Advisors</td>
<td>Recruit</td>
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<td>Retirement &amp; Bal</td>
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<td></td>
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<td></td>
<td>Schedule Recruiting Activities</td>
</tr>
</tbody>
</table>
Looking Ahead

• Team members “See Waste”
• Team members are designing the work
• Team members are asking for ownership opportunities!