



**ARTIFEX**  
FINANCIAL GROUP

# **Gate 4 Review**

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# 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 Day

# Big Wins!!!!

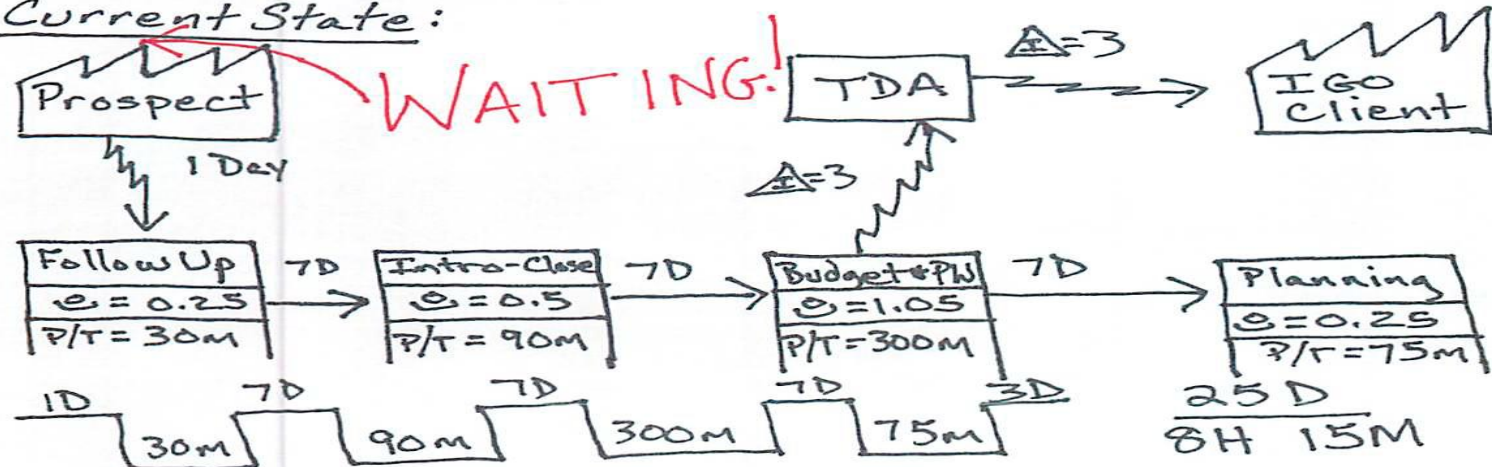
- Forced Cross Training
- Leveled work with Virtual Assistant
  - Solve 360
  - Ruby Receptionist
- No replacement of FTE
  - Approx. \$35,000 annual savings

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:



GOALS:

⇒ 10 NEW PROSPECTS / WEEK

⇒ 40% CLOSE RATE

10/Week Prospects ⇒ 4/Week Clients ⇒ ↑ \$150% YOY

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Coach: Kent Sears

### Analysis: Employee Workshop

- ⇒ Fee Schedule = (i)
- ⇒ Who are we?
- ⇒ Who do we serve?
- ⇒ Standard Offer?
- ⇒ Prospecting strategy?

### Countermeasures:

Waste	Root Cause	CM	Owner	End of			
				Q3	Q4	Q1	Q2
Re-work	- Fee Schedule - Training	- New Fee Schedule	DH			2013	→ Completed & ADV Update 9/5/1
Re-work	- Standard offer lacking	- One Retainer	DH & DK				→ Completed 8/31/2012
Waiting	- No Prospect Strategy	- Standard Work - COI - Solicitor Model	DH				→ Set Standard Contact Req: Recruit & Train Solicitors
Waiting	- No Message - Public - Advisors	- mkt. Plan - Recruit	DH & DK				→ Real Art Engagement → Retirement & Bal → Schedule Recruiting Activities

# Looking Ahead

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