

ADVISORPOWER: CUSTOM GROWTH PLANSSM

PlanningPower: An Actionable Business and Marketing Plan for your Success EdgeSM

Every great success story begins with a plan. Create a profitable, successful practice through the precision and focus of PlanningPower.

HOW YOU BENEFIT

After Excella's 14- to 16-week expert consultation, you and your firm will be able to do the following:

- Clearly articulate a vision for your practice
- Define one-year, three-year, and five-year goals with ease
- Clearly identify the characteristics of ideal clients who will support the achievement of your goals and understand how your current client mix compares to the ideal client
- Conduct a Total Needs EvaluationSM of each client's complete financial picture and deliver appropriate solutions
- Implement Excella's customized 18-month business plan, marketing program, and communications guide
- Measure actual results against your plan and fine-tune your activities for optimal success

WHAT EXCELLA WILL DELIVER

- A comprehensive 18-month action plan that includes the following:
 - A statement of your goals and vision for your firm
 - A detailed profile of your ideal client and recommendations on which current client relationships you should further develop
 - A quarterly plan to acquire new clients and develop your existing relationships
 - A strategy and approach to delivering a comprehensive set of client solutions
 - A marketing program with a set of specific client acquisition and development activities, including best practices for implementation
 - A communications guide with a set of recommendations for the type and timing of communications for your prospects and clients
- Training in Excella's methodology for conducting a Total Needs Evaluation and delivering appropriate solutions

As a separate service, Excella will provide ongoing support to help you implement your marketing program and communications plan if needed at the conclusion of the engagement.

HOW WE WILL COLLABORATE

To maximize the benefits from PlanningPower, we will ask that you collaborate with us in the following ways:

- Participate in biweekly conference calls
- Complete questionnaires and worksheets to facilitate information gathering
- Permit us to interview several of your clients and colleagues
- Provide us with samples of all of your client and prospect communications
- Review and provide timely feedback on the deliverables we create for you

GET STARTED TODAY

Contact Ani Yessailian at 617 886-6001 or AY@excellamarketing.com.