

Total Client Engagement 1:1 & Team Consulting

Engage with Pareto System to achieve a breakthrough and run a more efficient and profitable practice. This three-month kick-start will help you to build the foundation of your Best-Practices Playbook to:

- ✓ Elevate the client experience
- ✓ Professionalize your practice
- ✓ Create referral generating advocates

DURATION AND TIME COMMITMENT

Three-months of bi-weekly consultations and approximately 2-3 hours per week for program study and implementation.



INCLUDES:

A dedicated practice management coach - To serve as an accountability partner for you and your team as you work through our core linked-and-sequential implementation process.

Gap Analysis - Pareto Systems will “pop-the-hood” to uncover untapped opportunities and overlooked vulnerabilities in your business. This process will ultimately reveal exactly what you need to do to unlock the pathway to the next level and help Pareto to customize a deliverable to help you get there.

Best Practices Playbook - Pareto Systems will provide strategic input on practice management and relationship management solutions to create a scalable and predictable playbook, so that no matter how many messengers exist in a firm, the message and the process remains consistent.

Critical Path - A customized plan that will help you reach your goals.

Pareto Academy Implementation Dashboard – All of our programs are supported and made actionable by the Pareto Academy, which is an online virtual coaching application that contains additional step-by-step resources for implementing the strategies in each module. Resources include videos, articles, agendas, scripts, templates and tools.

**Speak to your First Trust wholesaler to register*