



PRACTICE MANAGEMENT ■ TOOLS ■ SERVICES ■ SOLUTIONS
Advisers, Licensees & Networks

ADVISER-FOCUSED SOLUTIONS	
HealthCheck	Practice benchmarking, qualitative and quantitative, comprehensive commentary and suggested 'next steps'.
CATScan	Client survey, confidential and anonymous, benchmarking against other advisers and all client comments.
Estate Planner	A tool aimed at adviser's clients or prospects, discerns client's preparedness in their estate planning, aids in client engagement.
SMP	Sales & Marketing Planner. Online, seven steps, creating focus and accountability.
HealthClub	Online coaching process, action follow up, access to online library of tools.
Business Health Guide to...	Practical business guides for all aspects of practice management.
Business Valuator	Snapshot of a business' value, online, 20 questions.
Confidential Staff Survey	Confidential survey of adviser's staff & comprehensive analysis of feedback.
Business Evaluation	In-depth assessment and valuation.
Coaching, mentoring	One-on-one or group sessions covering agreed topics.
Business Planning	The complete process, culminating in a fully documented business plan for the practice.
Workshops	One off, topic specific or ongoing program including follow-up, agreed actions and accountability.
LICENSEE-FOCUSED SOLUTIONS	
Real Time Compliance (RTC)	Online AFSL compliance and monitoring system. Fully customisable to your specific needs.
Valued Manager (BDM, PDM, Sales)	Program specific for licensee management. Peer to peer learning and sharing, industry insights, data.
BenchMarking Plus	Qualitative and quantitative benchmarking of your network vis-a-vis the market.
Profit Improvement	Customized and integrated programs for practices, supported by tools, guides and templates.
PD Scan	BDM/PDM survey, benchmarking.
Hidden Profits	Profit focussed communication, 12 issues per year to adviser network.
Research and analysis	Design, implementation, analysis.
Practice of the Year	Design, implementation, judging.
Presentations	Conferences, PD days, lunch & learn, wide range of topics.