

How We Create Value	Description	How It Creates Value	Proof of Client Commitment	Deliverable (Take Away)
I. Individual Revenue Assessment™	50 Question interview with each person responsible for developing new business	Benchmark for the individual and organization about what is taking place currently and uncovers areas of opportunity for new business	Meeting with management team	Summary of action items from individual meetings, complete assessments, six month training program topics identified
II. Business Process Review™	Power Point presentation understanding the five drivers of revenue growth	People recognize the role they play in each of the drivers	People become champions of each driver	Champions create committees and action strategies for implementation
III. Business Development Program™	Monthly group training and one-to-one coaching	People receive tools and resources to implement immediately in their day to day business	People realize and recognize the return and rewards of their new activities and the way they build relationships	The people and organization are focused more on generating business faster with accountability
A. Proven Business Development Tools	Interactive exercises, handouts and examples on proven tips that work	People can implement the tools and resources immediately	Deeper relationships are formed with clients, prospects and referral sources	Increased revenue from new business from existing clients and centers of influence
B. Action Strategy Model	Document with business development action strategies	New business development activities	Metrics and commitments are established	Action strategies are tracked and reported regularly

C.Accountability Partner Game Plan™	Information for serving as an accountability partner	Each person is responsible for ensuring the other person is making progress	Bonding, energy and success is created among each team	Internal support v a vested interest i progress and succ
D.Activity Tracking Model™	Excel spreadsheet with new business development activities identified	Creates momentum, accountability and competition peer to peer and firm-wide	People report at the monthly meeting what worked, what surprised them, what they learned and result of success	A tool that identif tracks and serves an accountability for building an effective pipeline
E.Revenue Tracking Model™	Excel spreadsheet with new business opportunities identified	Creates momentum, accountability and competition peer to peer and firm-wide	People report the leads in their pipeline	A tool that tracks business revenue what is in the pipe

IV. Committee for Growth™	Internal Group Focused on business development	Group meets monthly to discuss action strategies, processes; builds momentum and accountability	People look forward to meeting; track activities and leads, report on accomplishments	People see, hear & recognize that the success is tied to their activities; they learn from each other
V. Personalized Strategic Plans	Document used to create short-term and long-term goals	Creates daily, monthly, quarterly, annually, three-year and long-term goal setting	Action strategies are created in each of the goal sections by and with each person	Each person has a plan that is created by/with them; they have immediate buy-in and responsibility to meet their goals
VI. Employee Ownership Model	Investment in people, plans, training, goals, development	Empowerment, rapport, trust and support	Excitement, energy, verbal and actions are more open about business development	The firm is helping each person identify and reach their goals; people buy-in and think more like owners
VII. Long-Term Growth Plan	Strategic person plans and group training	Camaraderie and buy-in	Interest and willingness to learn more	Increased revenue per person; increased revenue per practice area and increase total revenue for organization; established rainmakers on the team; employee retention