



THE COXSWAIN STRATEGY

Have you ever seen the beautiful sight of four varsity crew athletes stroking their scull in perfect rhythm as they row to the finish line?

Just like a varsity rowing crew, for a business to move smoothly to the finish line, it must have organization, efficiency, teamwork, direction, and a compelling desire to succeed. In business, or varsity crew, if team members move in their own direction, and at their own pace, all is lost.

That's where the Coxswain – an on board coach who provides encouragement, direction, and steers the team down the right course – comes in. Without the Coxswain, the team can be lost, disorganized, inefficient, and operating against itself. Vestment Advisors has been the Coxswain to financial service companies since 1991, helping coach financial companies, both large and small, to business success.

Our Consulting Services can provide any financial service organization with an improved bottom-line performance, no matter your size, assets under management, or number of clients. We have identified two primary stages to our Consulting Services:

Stage #1 – Diagnostic

The process begins with the key executives – owners, stakeholders, presidents, and CEOs. Our goal is to help the leaders of your company achieve their goals and dreams. We want to know where your company currently sits and where you want the company to be, both short and long term. This becomes our mission during our consulting partnership.



Once we understand your goals, we develop a SWOOP Report, which highlights your company's Strengths, Weaknesses, Opportunities, Obstacles, and provide you with a (mini) Plan. Having this report will provide us with a concrete foundation from which we build, or rebuild, aspects of your business.

Stage #2 – Implementation

Depending on the level of consulting required to help your business achieve a new level of success, some, or all, of these areas will be addressed.

1. Strategic Business Plan

Many of our clients have inadequate or nonexistent business plans which serve as the roadmap for successful businesses. A Strategic Business Plan will provide business owners and executives with a critical tool for navigating the known and unknown waters of business. A properly developed plan will highlight your short- and long-term goals and provide concrete steps on how you will achieve them.

2. Staff Empowerment

Vestment Advisors thoroughly reviews the make-up, qualifications, and characteristics of your entire staff to identify staff strengths and weaknesses. By utilizing analysis and synergistic reporting tools from Kolbe™, we are able to structure your staff in a way that benefits your business and your bottom line. Once the employee structure is established, Vestment Advisors provides leadership training for executives and coaching programming for staff to create a cohesive, team-oriented atmosphere.

3. Marketing Plan

Recognizing the need for financial professionals to have a comprehensive marketing plan to attract new prospects, Vestment Advisors works with companies to implement a plan that works. Starting with the examination of target markets and opportunities, Vestment Advisors creates a plan, which highlights the financial advisor and their unique business traits and abilities.



4. Sales Analysis

Having an influx of new prospects is important to grow your business, but unless your staff understands how to close the sale, it is for naught. Vestment Advisors examines your existing sales process and looks for ways to improve on the strengths of the process and fix the weaknesses. Once the analysis is completed, Vestment Advisors trains your staff to work within the new process and the art of closing the sale.

5. Financial Analysis

Prudent financial management is imperative for financial service companies to grow. Without a sound, practical financial program, your company can lose money and lead to increased tax burdens. Vestment Advisors works with your company to identify existing and potential problems in your financial program and helps you devise a strategy to put money back in your pocket.

6. Operations Analysis

If a financial company lacks efficiency in its operations, it becomes increasingly difficult to manage employees, perform satisfactory customer service, and operate an effective internal and external communications program. Vestment Advisors works with your personnel to develop ways of improving performance while addressing existing inefficiencies.

7. Technology Analysis (if needed)

In an ever-changing technological landscape, it is easy for computer systems and databases to become outdated and ineffective. Are you operating with a current system? Is your database efficient and adequate for your company's unique needs? Vestment Advisors can evaluate your existing technology systems and make the necessary recommendations to improve this vital area of your business.

If your varsity team could use better efficiency, functionality and teamwork, Vestment Advisors can be your Coxswain. For more information, or to begin your diagnostic, call 952-401-1045 or visit us online at www.VestmentAdvisors.com.



*BREAKING BARRIERS,
BUILDING BUSINESS*

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