FOCUS

Focus Practice Management

Evidence > Anecdotes

About Our Offering

We believe the strongest advisory practices are built on data, not guesswork. Focus Practice Management gives advisors an expert resource at their fingertips—so you spend less time searching for answers and more time executing on them.

Our team of seasoned consultants—including former practicing advisors with 20+ years of experience—has synthesized insights from 850+ internal advisors and curated intelligence from leading industry sources into practical, actionable programs you can deploy incrementally across your practice.

We don't deliver one-size-fits-all curricula. We help you identify the right starting point, understand how each area of your practice connects to the others, and build momentum without overwhelming you or your team.

Our Purpose

Using an evidence-driven, fiduciary approach, we help advisors build better practices—ultimately enhancing the client experience.

Our Principles

- Evidence-based: Data and analysis drive decisions—not gurus or opinions
- Outcome-focused: Driven by advisor- and client-desired outcomes, not rigid formulas
- Client-first: Every recommendation starts with a fiduciary mindset
- Actionable: Designed for real practices—simple to implement, built for incremental progress

At a **Glance**

Internal data from **850+ advisors**, augmented by industry benchmarks

Team includes former practicing advisors with **20+ years** of experience

Practical, streamlined programs—not a heavy lift

Field-tested and **continuously refined** with real advisors

Data-driven insights, not anecdotes or opinions

Personalized to your practice—not a generic framework

Your first stop—educational resources across Schwab, Fidelity, Dimensional, and more

Three Focus Areas

An interconnected system—address one area and strengthen the entire practice

Strategy

The foundation of a thriving practice—plans that define success on your terms and establish the KPIs to get there.

Areas of Focus

- Business Strategy & Revenue Plan
- Offer & Pricing Strategy
- Experience Design & Measurement

Scale

Driving efficiency to serve more clients exceptionally well, without sacrificing quality or burning out your team.

Areas of Focus

- Capacity & Team Efficiency
- Segmentation & Service Models
- Transition & Succession Planning

Growth

Proven, field-tested tactics to help more people through stronger relationships and an intentional business development approach.

Areas of Focus

- Value Proposition & Ideal Client
- Referrals & COI Development
- Marketing Strategy & Communications

Business Outcomes

Enhanced client satisfaction · Revenue growth · More profitable client relationships
Robust sales pipeline · Lower client attrition · Higher share of wallet

How is Focus interconnected?

A shift in capacity impacts your ability to pursue growth. A refined value proposition changes how effective your revenue plan is. The quality of your client experience directly affects referability and retention. We help you identify where to start and map how each step builds on the last.

How We Work Together

Multiple ways to engage—we meet you where you are.

Live & Interactive

- Topical webinars & breakouts
- Divisional meetings
- Workshop cohorts
- Peer group sessions

Self-Study & On Demand

- Comprehensive libraries & advisor guides
- Field guides & workbooks
- Video overviews
- Advisor portals & blogs

Consulting & Coaching

- Field leadership training sessions
- 1:1 engagements
- Post-workshop follow-up coaching
- Peer group facilitation

We are **more than a training organization**. We help define what an **optimal practice** looks like, establish the KPIs to get there, and **continually research emerging ideas** to help **advisors succeed**.

Evidence › Anecdotes

What We Help You Accomplish

- Define what an optimized practice looks like for your specific situation—not a benchmark average
- Establish meaningful KPIs aligned to your practice stage and growth goals
- Save hours you'd otherwise spend searching Schwab, Fidelity, Kitces, Cerulli, and others— we've synthesized it for you
- Deploy programs incrementally so the work doesn't pile up
- Understand how each area of your practice connects—and where to start for maximum impact
- Stay current as new strategies, research, and ideas emerge

Growth Workshops

Two structured programs built for advisors at every stage of business development

Foundations

For advisors ready to sharpen foundational business development skills

A focused one-and-a-half day in-person cohort held in St. Louis, designed for Wealth Advisors and Senior Associate Wealth Advisors who are ready to build a consistent prospect pipeline and close business with more confidence.

What You Could Gain

- A consultative, personalized business development framework
- Strategies to build and manage a consistent prospect pipeline
- Coaching from tenured peers and experienced practitioners
- A concrete action plan to consistently achieve growth goals

Pre-work is assigned prior to the session. Post-program coaching is available to help you navigate key insights and next steps.

Applied

For experienced advisors ready to elevate their selling behaviors

A rigorous two-day in-person program developed in partnership with Dimensional Fund Advisors, drawing curriculum from the Kellogg Sales Institute at Northwestern University. Built for advisors with strong fundamentals who are ready for a deeper behavioral challenge.

What You Could Gain

- Advanced behavioral selling and communication skills
- A new lens for running client meetings and building durable relationships
- Immersive small-group exercises and real-world simulations
- The confidence to let your authentic approach shine through

Pre-work includes case study readings and exercises. Participation is intentionally limited to maximize coaching quality and peer exchange.

Ready to Get Started?

Every practice is at a different stage—and that's exactly how we designed these programs. Reach out to your leadership team to explore which solutions are the right fit for where your practice is today. Your leadership team can help you prioritize where to begin.

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