

DeVoe & Company Growth Accelerator

Maximizing Your Firm's Growth

The **Growth Accelerator** is a six-month program to help you optimize the growth of your company. Joining this “study group on steroids” will help you draft your growth strategy, train your advisors, develop KPIs and create a growth culture within your firm.

FACT: For every 1% increase in growth rate, an RIA's value increases 7%.

Sustainable growth is not driven by charisma, luck, or the personal heroics of the founders. Sustainable organic growth comes as the result of an intelligently designed integrated plan and the ongoing coaching of advisors. Our program is an accelerated path to put this in place.

Assessing Your Strengths – and Weaknesses

The **Growth Accelerator** starts with an objective assessment of the state of your company's growth capabilities. Using a 45-point questionnaire, the **GrowthDiagnostic™** evaluates your firm's performance across the five stages of the Prospect Lifecycle: Prospecting, Assessing, Positioning, Closing, Retaining. A proprietary analysis of your answers reveals an overall score, as well as individual ratings across the five stages.

Developing the Growth Building Blocks

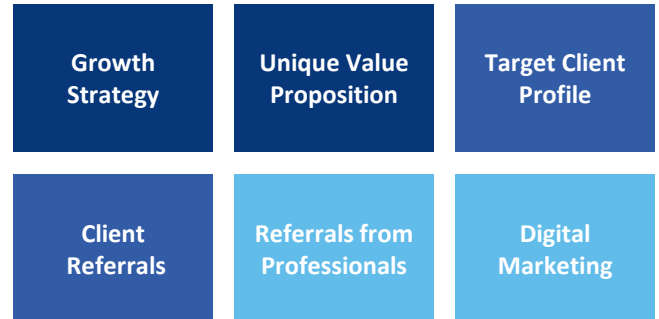
With clarity of your firm's areas of strength and weakness, you are now in a position to craft the underpinnings of your strategy. We then focus on clarifying your value proposition, documenting your ideal client profile and crafting the growth strategy.

Creating a Growth Culture

Next, we will provide you with agendas and materials to meet weekly with your advisors. They will learn how your vision and mission tie back to growth. Our monthly meetings will help ensure you are confident to teach and coach new skills, and track and improve your team's performance.

Together, we are building a growth machine and recalibrating it to run at optimal performance. You are not only changing behavior, but you are also developing a 'healthy growth culture'.

Maximizing Your Firm's Growth: Six Sessions



The program includes:

- **Six Study Group Meetings:** Each month, the group assembles online to engage on the current module, review KPIs and tailor strategies for your team.
- **GrowthDiagnostic:** An assessment of your company's growth based on a 45-point questionnaire incorporates dynamic peer benchmarking.
- **Integrated Frameworks & Proprietary Tools:** Pre-work and tools for each module will help you develop actionable plans for your team.
- **Coaching Sessions:** Meet regularly 1/1 with a DeVoe Managing Director to gain clarity and guidance specific to your company.
- **Website Evaluation:** Receive an assessment of your website to help optimize it for growth.
- **Community of Peers:** We will connect you with study partners for optional one-on-one discussions.
- **DeVoe Event Admission:** You will get complimentary access to our next event, *DeVoe Elevate* or *DeVoe M&A+ Succession Summit*,

The **Growth Accelerator** is run periodically. The comprehensive, integrated program will include eight to 12 of your peers and be guided by DeVoe & Company leaders.

Growth Accelerator Program membership is \$15,000.

Getting Started

For more information or to sign up for the next program date, call us at 415-813-5066 or send an email to:

lynn.kennerly@devoe-co.com.