



# MY FIRM'S TALENT

DEFINE, ATTRACT, RETAIN, ELEVATE

Are you intentional about optimizing your team and talent? Or are you usually in a reactive stance? Proactivity is key to growth and continuity, while passivity can harm your team, finances, and business.

Step 1: Use this document to clarify your current state, goals, opportunities, and gaps.

Step 2: Design a plan to pursue changes, and reach out for strategic or tactical help.

Looking for guidance or support? [Let's talk about designing and implementing your talent strategy.](#)

DEFINE

## OUR FIRM TODAY:

Revenue: \$ \_\_\_\_\_ Associates: # \_\_\_\_\_ Clients: # \_\_\_\_\_ Value: \$ \_\_\_\_\_

Profit Margin: \_\_\_\_\_ % Revenue per Advisor: \$ \_\_\_\_\_ Comp per Advisor: \$ \_\_\_\_\_

## PROJECTED GROWTH:

Gradual (5-10%)  Moderate (10-20%)  High (>20%)

## EXPECTED CHANGES:

Size  Fees  Target Client  Services  Location(s)  Other:

## OUR FIRM IN \_\_\_\_\_ YEARS:

Revenue: \$ \_\_\_\_\_ Associates: # \_\_\_\_\_ Clients: # \_\_\_\_\_ Value: \$ \_\_\_\_\_

Profit Margin: \_\_\_\_\_ % Revenue per Advisor: \$ \_\_\_\_\_ Comp per Advisor: \$ \_\_\_\_\_

## WE'RE CLEAR ABOUT OUR:

Yes  No **Culture:** Written values inform our hiring and management

Yes  No **Roles:** Each person has well-defined responsibilities and goals

Yes  No **Plan:** Our leaders and associates are accountable for activities & results

ATTRACT

**WE ARE PROUD OF OUR:**  Online presence  In-person networking  Associate value proposition

**WE SEEK TALENT:**  Proactively  Reactively By: \_\_\_\_\_

**WE WILL ADD:** \_\_\_\_\_ # of staff to **existing** roles: \_\_\_\_\_

\_\_\_\_\_ # of staff to **new** roles: \_\_\_\_\_

\_\_\_\_\_ # of **interns** to focus on: \_\_\_\_\_

RETAIN

**OUR COMPENSATION IS:**  Clear  Competitive  Motivating

**OUR BENEFITS ARE:**  Values-Based  Competitive  Motivating

## OUR WORLOAD IN

- **ADVISORY FEELS:**  Intense (overtime)  Manageable (busy)  Steady (capacity for growth)

- **OPERATIONS FEELS:**  Intense (overtime)  Manageable (busy)  Steady (capacity for growth)

ELEVATE

**OUR COMPENSATION IS:**  Intentional  Frequent  Effective

**OUR CAREER PATHS ARE:**  Clear  Competitive  Motivating

**OUR OWNERSHIP OPPORTUNITIES ARE:**  Clear  Competitive  Motivating