# Practice Management

## Envision Your Future

CAMBRIDGE


The Cambridge Practice Management Team helps you focus on your role as both financial advisor and business owner. We provide consulting and coaching to create customized paths to help you achieve your goals.

**Our Mission**

To help Cambridge advisors take charge of their position in a competitive market by streamlining operations, accelerating revenue growth, and building practice equity.


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COACHING
OUTSOURCING
PRACTICE
MANAGEMENT

# Connecting

Many times, the best resources are your peers. Through Cambridge's peer networking opportunities, you can learn and benefit from the experience of other advisors — and they can benefit from yours.

## Cambridge Nation

Cambridge Nation is a private online community for Cambridge advisors to share, recommend, brainstorm, and connect with peers. Topics can include office technology, investing trends, case study examples, marketing ideas, and many other questions that come up daily.

Cambridge Nation offers many features, including the ability to:

- Create a custom profile
- Search for peers
- Post a message
- Share or download a file
- Browse previous discussion posts or shared files
- Receive real-time or Daily Digest communications

## TRAIN Webinars

TRAIN is our acronym for Technology, Resources, Advice, Investments, and Networking. TRAIN webinars are held quarterly, designed to help you get on the right track to successfully build your practice. Practice Management focused topics are geared to help keep you up to date on trends, tools, and insights impacting financial professionals today.

## Synergy Exchange

Whether you're new to the financial services industry or an experienced advisor, mentoring can be a valuable tool to help you take your business to the next level. Synergy Exchange is an online networking resource designed to help you find and connect with others inside Cambridge Nation. Your mentor or mentee could be right down the street or on the other side of the country. This advisor-to-advisor mentoring program reflects our commitment to your professional development, designed to assist with:

**Professional development | Networking | Achieving personal goals | Sharing experiences**


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# Consulting

Take charge of your practice by using our consultations designed to help streamline operations, accelerate revenues, and build practice equity.

## Practice Management Consultations

These one-time consultations will link you to our extensive menu of trainings, resources, and educational opportunities.

## Technology Consulting

We provide customized technology consultations to determine your needs and help make skilled decisions regarding the tools that will work best for you. We also offer in-house technology and negotiated discounts with outside vendors in the following areas:

- CRM
- Imaging/scanning
- Forms/population
- Research and reporting
- Financial planning
- Performance reporting

## Roadmap to Revenue

Roadmap to Revenue is a unique one-on-one consulting program that allows you to set and achieve personalized goals. You determine the scope to ensure attention is given to the topics most important to your business, including:

- Branding
- Defining your market
- Staff communications
- Client events
- Business growth metrics
- Technology implementation
- Digital strategy/social media
- Time management
- Referral tactics
- Value proposition
- Client experience


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# Coaching

The Cambridge Practice Management Team offers a specialized, hands-on coaching program, Real Practice Management (RPM). In this program, advisors are partnered with one of our Strategic Business Coaches. Our coaches help with goal setting and improving efficiencies, as well as accountability.

## RPM Vision (First year program)

- Four off-site, two-day sessions at a determined destination*
- Educational presentations and networking opportunities
- Focus on developing your Business Plan, Marketing Plan, and Continuity/Succession Plan

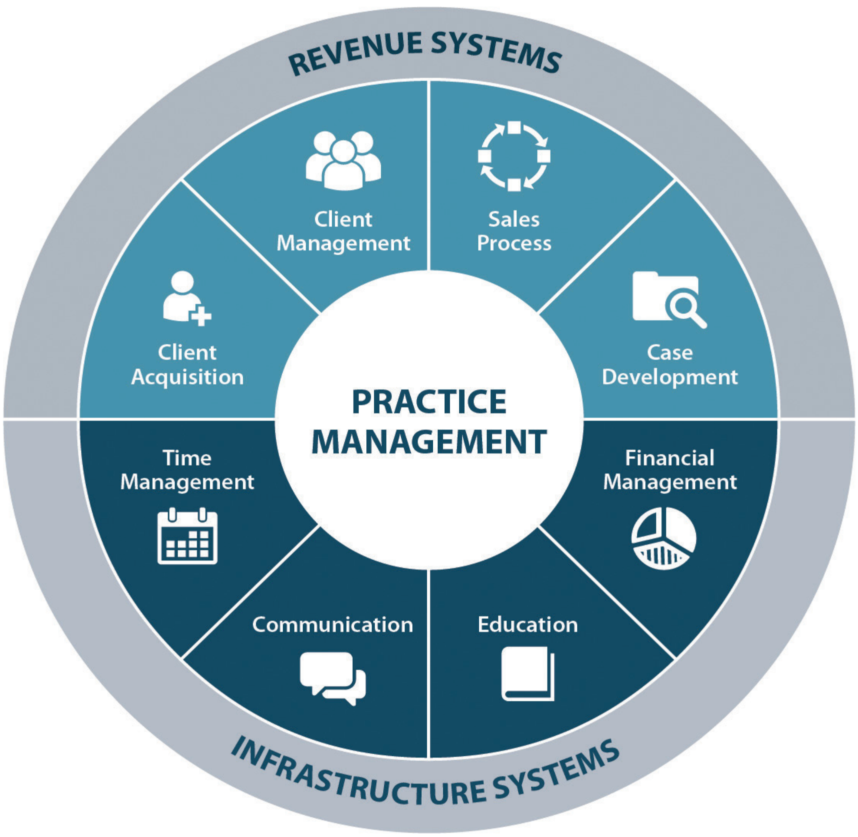
## RPM Focus (Second year program)

- Four off-site, two-day sessions at a determined destination*
- Educational presentations and networking opportunities
- Development of Strategic Plan (three-, five-, 10-year vision), Disaster Recovery Plan, and Operations Manual

## RPM Recharge (Third year and beyond)

- Two offsite, two-day sessions at a determined destination
- Designed to re-engage and keep you focused on key relevant topics to continue your success

## The Eight Business Systems




*Required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# Outsourcing

The Practice Management Team can help connect you with a number of resources inside Cambridge Source to help grow and streamline your business.

## Office Support

- Office Assistant
  – Allows you to hire an assistant who works virtually from the Cambridge home office
- HR Consulting
  – Seeks out talented associates for advisor offices, including background research, interviews, and career events
- Technology Services
  – Helps protect devices, back-up data, and review technology needs

## Marketing

- Customized Advisor Marketing
  – Creates marketing collateral for advisor's promotional and informational needs
- Website Design
  – Creates modern, mobile-friendly websites

## Practice Advancement

- Business Consulting
  – Analyzes advisor's practice and provides objective evaluation of current business model
- The Next Step™ Advisor Internship Program
  – Assists with recruiting, hiring, and training the next generation of financial advisors

## Professional Development

- Street to Staff: 1.0, 2.0, and 3.0
  – This series of consecutive courses teaches a new associate industry knowledge, Cambridge systems and technology, and other essential administrative items. Street to Staff 1.0, 2.0, and 3.0 are available a la carte, or sign up for all three courses in advance.
- Street to Advisor
  – Ensures new advisors establish the groundwork for a successful career
- Work Style Dynamics
  – Unlock your office's potential with on-demand assessments such as the Kolbe A™ Index, Kolbe RightFit™, and Time Mastery Profile

## Specialized Services

- Independent Registered Investment Adviser (RIA) Consulting
  – Helps independent RIAs manage compliance requirements
- Social Media Trainer Support
  – Trains a member of an advisor's team to be an expert on different social media platforms
- Event Planning
  – Assists with a range of services from consulting to on-site event management

For more information on our practice management resources, contact us (practicemanagement@cir2.com) at 800-777-6080.

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