

# Practice Optimization Check In

Give yourself 1 point for each core process that is written down and you follow regularly.

<b>Core Process Checklist</b>	<b>Yes</b>	<b>No</b>
Ongoing business assessment		
Business goals (including mission & vision)		
Business development plan		
Introduction/Referral strategies		
COI strategies		
New client on-boarding process		
Client segmentation & client contact strategy		
Client review process		
Financial planning / asset management process		
Client retention strategy (loyalty & engagement)		
Team roles & responsibilities		

**How confident would you feel if you could answer “yes” to all of the above?**