



# The Practice Optimization Program

The Practice Optimization Program was created to help you revitalize and expand your business by providing Financial Advisors, Business Owners and Practice Managers with a systematic and objective way to quickly assess their business and create a Strategic Implementation and Accountability Program to accelerate the materialization of their Ideal Practice & Lifestyle.

The process provides the business owner with a 100% Objective View of (9) key Business Systems against a backdrop of best practices for a particular function, Client Service, Sales... and the discerning eye of your facilitator and coach.

The POP program includes a "through and objective" review of your practice and the players using the PSA Assessment program which includes one on one interviews, job modeling and individual assessments which compare the behaviors needed by the position against an individuals behavioral profile (job fit).

For on-boarding and coaching we provide both collaboration (any two people) and team reports. These reports share key sights on behavioral strengths and weaknesses, communications style, motivators, coaching and communications and decision style tips. The reporting enables you to compare any two people and/or multiple team members in 12 key business behaviors .

The personalized insights are further complimented by **one-on-one debriefings** and **team workshops** to bring action to the process. **Individual personalized development plans** are created for each team member.

The process provides you with a well organized , streamlined mirror to help you create and/or fine tune your Strategic Business & Marketing with a detailed implementation **strategy and program (SIP)** that achieves both your personal and professional objectives. The POP process has been streamlined to help you prioritize and identify any issues that might be holding you back. The POP process will help increase clarity, focus and alignment with team members and provide you with a strategy and **road-map** to optimize team productivity and leverage your own personal strengths.

The Practice Optimization Program provides you with a **blueprint** and a systematic way to build your Ideal Lifestyle and Practice. The POP was developed working with TOP Advisors, Industry Leaders and some of the Financial Industry's best consultants, coaches and training resources. Not only will you jump start your practice, but chances are you will rejuvenate yourself in the process.

*The POP Program includes an Executive Summary, a detailed review of each key area (see below) a Strategic Implementation Plan and a profile of each team member that includes a personalized development plan.*

- PERSONAL VISION, PURPOSE & GOALS
- BUSINESS VISION, MISSION & GOALS
- STRATEGIC MARKETING PROGRAM
- CLIENT SERVICE & DEVELOPMENT
- SALES PROCESS & DISCOVERY
- REFERRAL PRACTICES
- PRACTICE MANAGEMENT
- PERSONAL EFFECTIVENESS
- ACCOUNTABILITY
- REPORTING

*"Paul is one of the few coaches who understands all the pieces to building and sustaining a high performance practice. I have found that most coaches are pretty good at strategy but leave the execution totally to the advisor. This is where Paul really shines by working hand-in-hand with my team. He made sure that our implementation was successful. **Greg Telge, CLU, ChFC, CFP, MSFS, REBC, AEP Wealth Management Advisor***

## LEVELBREAKER COACH • TALENT MANAGEMENT • TEAM BUILDER

A former UCONN Husky Football player, Paul knows what it takes to make things happen. As a walk on, he earned a full scholarship and was a starter for 4 years at 3 different positions. He finished with two championships and a team of lifetime friendships. When he started his career as a computer salesman he applied the same formula in his business (commitment and discipline) and quickly rose up the corporate ladder from Sales REP to VP US Sales in 12 years by consistently breaking individual, team and company records for performance and growth. An early endorser of behavioral psychology, he recognized the potential and the power of building teams when you combine different strengths and approaches with a **unified strategy**. The results were always similar - Performance Objectives Achieved, improved employee morale , greater client satisfaction and reduced turnover. He knew he had something to share so he left the corporate world and started Performance Systems & Associates, Inc. as an associate of Brian Tracy and Steven Covey to share his method's as a leader, sales executive, talent consultant & Executive Coach. What makes Paul unique is his programs come from a ton of real life, practical experience and a lifetime commitment to continuous learning & improvement