Know No Bounds, LLC

Areas of Expertise

Below is an overview of our areas of expertise and the topic we offer to firms and their advisors. Our solutions are specifically customized based on an organization's needs. With each of the listed topics, we can develop and provide **in-person presentations, webinars, online content, tools, resources, and individual services.**

Practice Management Topics

★ Activity-based Business Planning
★ Team Development and Retention
★ Team Roles and Responsibilities
★ Team Communication and Interpersonal Development Solutions
★ Team Structure and Partnership Viability
★ Client Segmentation
★ Account Migration Strategies
★ Systematizing Your Business
★ Resource Utilization
★ Team Leadership
★ Branch Leadership

Client Acquisition Topics

★ Client Acquisition Planning and Strategies
★ Ideal Client Relationship Definition
★ Client Attraction Process and Marketing Strategies
★ Story and Elevator Speech Development
★ Discovery and Fact Finding
★ Converting Prospects to Clients
★ Marketing Communication and Pipeline Touch Plan
★ Referral and Client Advocacy Strategies
★ Specific Marketing Campaigns
★ Creating a Culture for Success with Banking Partners
★ Finding and Retaining Ideal Client Relationships

Client Development Topics

★ Service that Drives Revenues
★ Implementing the 5 Steps to 5-Star Service Process™
★ Client Communication Plan
★ Client Appreciation Plan
★ Service Menu and Calendar
★ Client Commitment Agreement and Meeting
★ Client Onboarding
★ Client Engagement Process
★ Client Feedback Survey
★ Capitalizing on Organic Growth Opportunities
★ Client Profiling Campaign

For more information or to customize a program, please contact
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