

CAPABILITY	SIMPLIFIED DESCRIPTION
PRACTICE MANAGEMENT	POSITIONED WITHIN THE ADVISOR ENGAGEMENT PROCESS AS A REACTIVE, OPTIONAL OFFERING OR AS A PROACTIVE, PRE DEFINED OFFERING TO A TARGETED ADVISOR SEGMENT OR COMMUNITY
ADVISOR RECRUITING	POSITIONED WITHIN THE ADVISOR RECRUITING PROCESS AS AN OPTIONAL VALUE ADDED OFFERING AND PRICED INTO THE RECRUITING FINANCIAL PROFORMA TO DRIVE AUM, AUA GROWTH AND RETENTION
NATIONAL CONFERENCES	ALPHA REPORT SERIES IS LEVERAGED WITHIN NATIONAL CONFERENCE SERIES WITHIN ADVISOR BREAKOUT SESSIONS AS A VALUE ADDED CONTENT (NO VENDOR PRODUCT NOR SERVICE BIAS)
GROWTH FUNCTION	POSITIONED WITHIN THE ADVISOR ENGAGEMENT PROCESS AS A REACTIVE, OPTIONAL OFFERING OR AS A PROACTIVE, PRE DEFINED OFFERING TO A TARGETED ADVISOR SEGMENT OR COMMUNITY
STEERING COMMITTEES	FOR CEO, ADVISOR RECOGNITION OR INITIATIVE STEERING COMMITTEES REPORTS ARE AN OPTIONAL TOOL TO HELP FACILITATE AND ENABLE IDEATION, STRATEGY AND EXECUTION SUPPORTING A PREDEFINED TOPIC
STRATEGIC PLANNING & EXECUTION	POSITIONED IN THE STRATEGY FUNCTION SUBPROCESSES INCLUDING MARKET RESEARCH, COMPETITIVE INTELLIGENCE, INITIATIVE SELECTION, PLANNING, INITIATIVE EXECUTION AS ENTERPRISE PROCESS MANAGEMENT ROADMAPS
TECHNOLOGY & INFORMATION SERVICES	POSITIONED AS ENTERPRISE, BUSINESSS UNIT AND FUNCTIONAL LEVEL BUSINESS REQUIREMENT DOCUMENT INCLUDING, ENTERPRISE PROCESS DEFINITION, PROCESS MEASUREMENT, DASHBOARD AND SCORECARD MEASUREMENT DEFINITIONS
HUMAN RESOURCES	LEVERAGED AS BUSINESS REQUIREMENTS DOCUMENT INCLUDING; ORGANIZATION DESIGN, REPORT STRUCTURE DESIGN, PROCESS DEFINITION, ROLE DEFINITION, ROLE KPI, COMPENSATION DESIGN, CAREER PATHING/DEVELOPMENT DELIVERABLES
FINANCE	THE SPECIFIC ALPHA REPORT'S PROFIT AND LOSS IS INTEGRATED INTO THE ENTERPRISE FINANCIAL PLANNING PROCESS AND LEVERAGED AS AN ONGONG INPUT TO MEASURE AND MONITOR FINANCIAL IMPACT OF REPORT SPECIFIC INITIATIVE
ADVISOR COMMUNITIES	WHETHER CHOSING FROM STANDARD (125 AVAILABLE TOPICS) OR CREATING CUSTOMIZED CONTENT, THE REPORTS ARE POSITIONED AS A VALUED ADDED OFFERING TO ENABLE INDEPENDENT ADVISORS SCALE THEIR BUSINESSES

