



# Scope of Service

A summary of services provided to your agency within the selected service plan.



## Advisor Service Summary

<b>Service Tier</b>	Advisor
<b>Consultant</b>	Colby Allen, MBA, ARM, AIDA, CXAP
<b>Service Location</b>	Remote/virtual via video conferencing
<b>Service Duration</b>	Monthly recurring
<b>Service Fees</b>	To be determined after needs discovery call
<b>Service Deliverables</b>	Monthly meetings, client portal with written resources, bi-monthly agency doc or resource reviews
<b>Start Date:</b>	Onboarding begins immediate upon agreement execution. Monthly recurring begins the first of the month following successful completion of onboarding.

## Advisor Service Objectives

The Advisor Service is intended for agencies that are seeking guidance or mentorship on setting and achieving growth goals. This is accomplished by:

1. Learning the history of the agency and current ownership's vision, mission, and values.
2. Establish owner benefit goals for growth, exit planning, or other values that stakeholders can support through their ownership in the agency.
3. Establish financial goals and KPI targets which are ordered towards owner value goals.
4. Establish operational goals which drive the achievement of financial goals within the agency's plan.
5. Provide regular cadence of planning, accountability, and guidance on agency's established goals and performance toward achieving objectives.

# Advisor Service Scope

The Advisor Service provides a holistic onboarding experience to gather important information about the agency, a robust historical financial analysis, as well as orientation with the agency's staffing and organizational structure. Once the initial orientation is complete we go through a goal setting workshop designed to enable the agency owner to establish a clear vision on executable projects ordered to achieve their personal and professional goals.

## Service Deliverables

Item #1	Onboarding	Target Date	Completed
<input type="checkbox"/>	Orientation of Client Portal		
<input type="checkbox"/>	Data Collection and Historical Analysis		
<input type="checkbox"/>	Goal Setting Workshop		
<input type="checkbox"/>	Goal and Value Tracking Resources		
Item #2	Monthly Recurring Meetings	Target Date	Completed
<input type="checkbox"/>	Schedule Day/Time for Regular Meetings		
<input type="checkbox"/>	Schedule Mid-Month Touchpoints		
Item #3	Value Planning	Target Date	Completed
<input type="checkbox"/>	Valuation		
<input type="checkbox"/>	Value Scorecard		





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## Executive Service Summary

<b>Service Tier</b>	Executive CFO
<b>Consultant</b>	Colby Allen, MBA, ARM, AIDA, CXAP
<b>Service Location</b>	Remote/virtual via video conferencing
<b>Service Duration</b>	Monthly recurring
<b>Service Fees</b>	To be determined after needs discovery call
<b>Service Deliverables</b>	Monthly meetings, client portal, financial planning resources, monthly executive report, scheduled operational analyses, annual company report
<b>Start Date:</b>	Onboarding begins immediate upon agreement execution. Monthly recurring begins the first of the month following successful completion of onboarding.

## Executive Service Objectives

The Executive CFO Service is intended for agencies that are seeking active guidance on setting and achieving growth goals utilizing proactive financial planning, analysis, and strategic planning to de-risk the agency and accelerate value. This is accomplished by:

1. Learning the history of the agency and current ownership's vision, mission, and values.
2. Establish owner benefit goals for growth, exit planning, or other values that stakeholders can support through their ownership in the agency.
3. Establish financial goals and KPI targets which are ordered towards owner value goals.
4. Establish operational goals which drive the achievement of financial goals within the agency's plan.
5. Provide regular cadence of planning, accountability, executive financial reporting, and guidance on agency's established goals and performance toward achieving objectives.

# Executive Service Scope

The Executive CFO Service provides a holistic onboarding experience to gather important information about the agency, a robust historical financial analysis, as well as orientation with the agency's staffing and organizational structure. Once the initial orientation is complete we establish a cadence of implementing projects and executive reporting to follow a charted value map intended to accelerate enterprise value and achieve goals for stakeholders.

## Service Deliverables

Item #1	Onboarding	Target Date	Completed
<input type="checkbox"/>	Orientation of Client Portal		
<input type="checkbox"/>	Data Collection and Historical Analysis		
<input type="checkbox"/>	Goal Setting Workshop		
<input type="checkbox"/>	Establish Agency Budget and Forecasts		
<input type="checkbox"/>	Design Agency KPI/OKR Dashboard		
Item #2	Monthly Recurring Meetings	Target Date	Completed
<input type="checkbox"/>	Schedule Day/Time for Regular Meetings		
<input type="checkbox"/>	Schedule Mid-Month Touchpoints		
Item #3	Scheduled Analyses/Projects	Target Date	Completed
<input type="checkbox"/>	Valuation		
<input type="checkbox"/>	Book of Business Analysis and Planning		
<input type="checkbox"/>	Staff Productivity Analysis and Planning		
<input type="checkbox"/>	Staff Compensation Analysis and Planning		
<input type="checkbox"/>	Company Annual Report		

