



# **Advisor's Playbook to Unlock Explosive Growth**

**12 WEEK PRACTICE  
ENHANCEMENT  
PROGRAM**



# Practice Enhancement for Advisors, by Advisors

**PracticeiQ** is a transformative 12-week business improvement program to help advisors elevate their practices. It draws on the insights and best practices of some of the industry's most successful advisors. It provides actionable strategies to enhance client satisfaction, boost business profitability, and achieve personal and professional growth. Whether you are a seasoned veteran or a new advisor, **PracticeiQ** equips you with the tools and frameworks to build a scalable, efficient practice for long-term success..

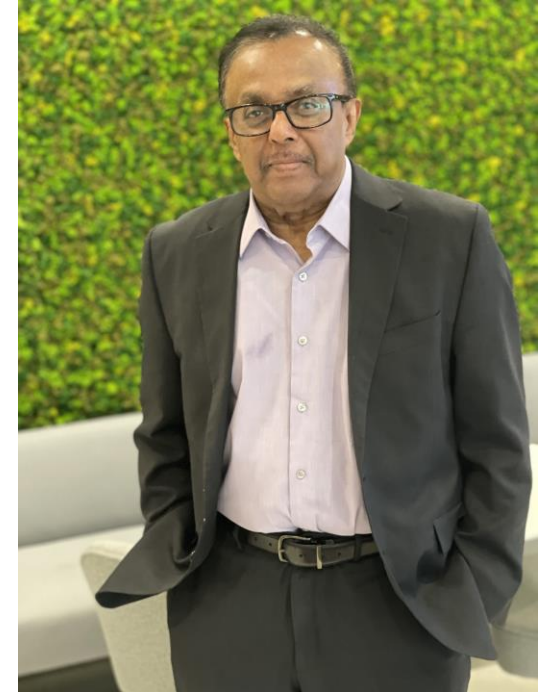
# Who We Are

Experienced professionals with over 100 years of combined experience in:

- Practice Management
- Branding and Marketing Management
- Sales Pipeline Management
- Integrated Marketing and Communications Management.



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# What We Do

## We Help Advisors:

- **Continually educate themselves** – on industry, regulatory and investment trends
- **Prioritize client relationships** - understand client goals and needs
- **Communicate effectively** – simplify, explain and educate
- **Set clear goals** – targets for retention, share-of-wallet, referral and acquisition
- **Diversify their services** – comprehensive advice offering
- **Embrace technology** – leverage tools to gain efficiencies
- **Maintain a strong network** – subject matter experts for ancillary services
- **Hold high ethical standards** – professionalism that gains trust
- **Adapt to change** - pivot according to client, industry and technology trends
- **Prioritize work-life balance** - manage stress for clear decision-making





# Why We Do It

**We have a passion for helping financial advisors grow their practice.**

This program is committed to helping advisors like you optimize your practice for growth by adopting a "business owner" mindset. We believe that in today's world, success means excelling in all facets of the job.

We chose the name PracticeiQ because working closely with top advisors has taught us that daily actions determine your success. That's why we go beyond the "best practices" approach of other programs to help you create "better practices" that put you ahead of the curve – and keep you there.



# Why It Works

## We Understand Your Challenges

- You're bombarded with information every day
- You take shortcuts to deal with it
- You may fall into predictable patterns
- You struggle to find time for the high-value activities that grow your business.
- You worry about maintaining relevance in a highly competitive market
- Your clients are more informed and becoming increasingly demanding
- You are frustrated with expanding regulatory requirements
- You feel your work-life balance slipping away



# Why It Works

## We understand your client's needs

- **Trust** - “I am looking for complete honesty.”
- **Expertise** - “I want you to adhere to the highest standards”
- **Communication** - “I want clear and concise updates I can understand.”
- **Personalization** - “I want you to tailor your services to my needs.”
- **Transparency** - “I know fees, conflict, and rationale for investment recommendations.”
- **Performance** - “Risk and return aligned with my investment personality.”
- **Accessibility** - “Make it easy for me to visit my money.”
- **Relationship** - “I demand mutual respect and the ability to discuss issues beyond just my money

# What The Program Is

## Overview

**Section 1. Analysis & Goal Setting**

**Section 2. Growing Your Business**

**Section 3. Running Your Practice**

**Section 4. Visual Roadmap**

## Sections Content

- ✓ Introduction
- ✓ Curriculum
- ✓ Workbook
- ✓ Summary
- ✓ Case Study
- ✓ Resources



# What The Program Is

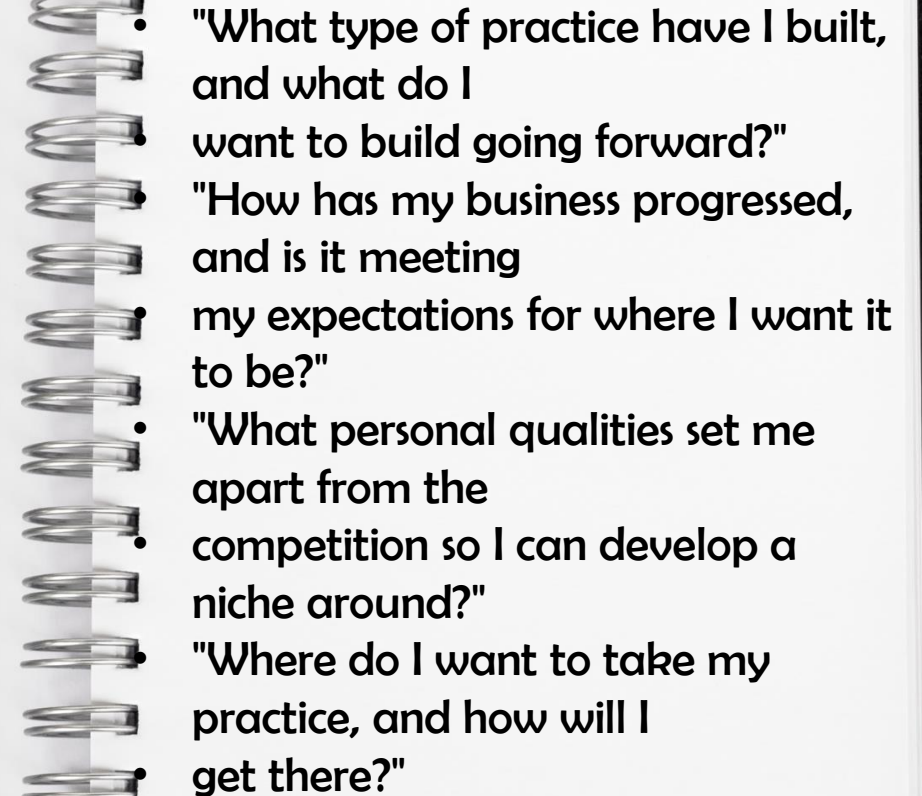
## Section 1. Analysis & Business Plan

**Lesson 1:** Self Assessment

**Lesson 2:** Value Proposition

**Lesson 3:** Practice Analysis

**Lesson 4:** Business Plan

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- "What type of practice have I built, and what do I want to build going forward?"
  - "How has my business progressed, and is it meeting my expectations for where I want it to be?"
  - "What personal qualities set me apart from the competition so I can develop a niche around?"
  - "Where do I want to take my practice, and how will I get there?"

# What The Program Is

## Section 2. Growing Your Business

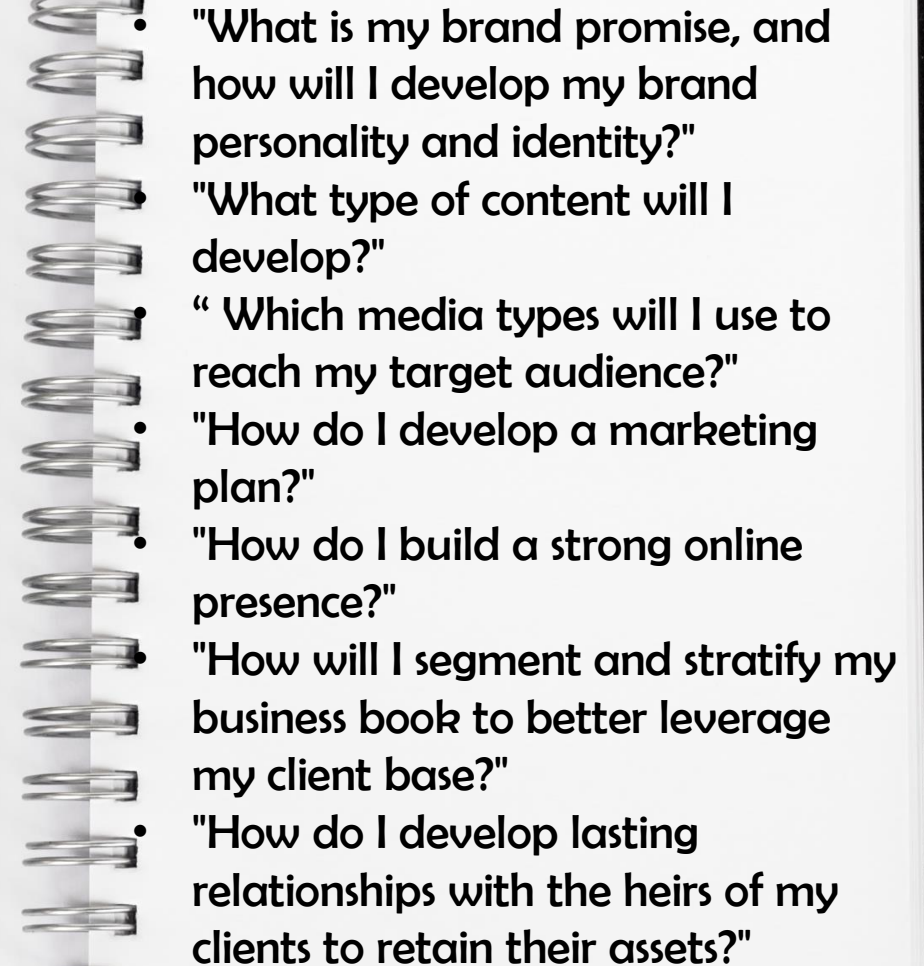
**Lesson 5:** Brand Building

**Lesson 6:** Marketing Strategy

**Lesson 7:** Relationship Management

**Lesson 8:** Prospecting

**Lesson 9:** Generational Wealth Transfer

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- "What is my brand promise, and how will I develop my brand personality and identity?"
  - "What type of content will I develop?"
  - "Which media types will I use to reach my target audience?"
  - "How do I develop a marketing plan?"
  - "How do I build a strong online presence?"
  - "How will I segment and stratify my business book to better leverage my client base?"
  - "How do I develop lasting relationships with the heirs of my clients to retain their assets?"

# What The Program Is

## Section 3. Running Your Practice

**Lesson 10:** Building Your Team

**Lesson 11:** Leveraging Technology

**Lesson 12:** Succession Planning

"What are the core functions of my service offer and the skills and expertise required?"

"Who can play those roles?"

"What are the basic hardware requirements for running my practice from phone to computer?"

"What are the software requirements for operations, productivity, CRM, and security?"

"When do I want to leave my practice, and what are my options and obligations concerning legal, valuation, and communication?"

# Advisor Benefits

## 12 Weekly Review Sessions

- Coincide with the 12-week PracticeIQ program for maximum alignment and reinforcement.
- Hosted live to provide real-time interaction and support.

## Collaborative Learning Environment

- Engage with fellow financial advisors to share insights, success stories, and practical applications.
- Discover innovative approaches and uncover challenges together, fostering collective growth.

## Expert-Led Discussions

- Sessions guided by industry leaders who provide clarity and actionable takeaways for each week's material.
- Gain deeper insights into applying best-in-class processes to your practice.

## Key Benefits:

- Enhanced understanding and application of the program's concepts.
- Opportunity to network and learn from peers with similar goals and challenges.
- Immediate support and feedback to address obstacles and implement strategies effectively.

**The live review sessions are more than just a complement—they're a vital part of your journey, ensuring you leave the program with actionable strategies.**



# Practice Enhancement for Advisors, by Advisors



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A robust process and sales training program equips advisors for success and strengthens the company's overall reputation, operational efficiency, and growth potential.

This investment in training serves as a differentiator in the market, attracting motivated advisors and positioning the company as a leader in the financial services industry.



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[Book a 15-minute Call](#)

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