



- ▶ HOW PREPARED IS YOUR ORGANIZATION FOR THE DOL REGULATIONS OR TAX REFORM?
- ▶ HOW WILL YOUR ORGANIZATION CAPITALIZE ON THIS DISRUPTION?
- ▶ WHICH PRODUCTS NEED TO CHANGED, BE MODIFIED OR DIVESTED?

Getting the Right people, focused on the Right decisions, at the Right time!



Why We Do IT

StrategyMD™

leverages a unique quantitative approach and an obsessive group of 20+ year seasoned consultants and C-Level executives to lead quality transformations using our Wheel below with our 4 building blocks.

We do not try to be all things to all clients, we pride ourselves on listening to your needs and providing outcomes that grow your business, and if we can't do the work we will find someone who can. The people you meet are the people that do the work. We are refreshingly priced because, we do things in real-time (5-10 days) vs. consulting time (4-6 weeks) leveraging our proprietary software resulting in an **average of 30% bottom line impact.**

Financial Services Focus

Developing the right mechanisms, systems and tools for strategic development and implementation is critical to the success of any Financial Services organization. Today's competitive climate is compounded by mounting **fiduciary** pressures and the complexity of **digitization and Evidence of Alpha** that drives **client management**. This type of rapid transformation requires that organizations continuously improve **client outcomes** while simultaneously **managing costs**. Those Financial Services organizations that can rapidly reduce these competing responsibilities while improving **quality of service** will win. Building the correct **global wealth management infrastructure** that will drive the **client experience** can only be accomplished through aligning process, technology and then people.

CapabilityAnalytics™ (CA) provides a distinct view of a Financial Services organization by **what it does — through capability models**. Organizations use this perspective to develop a common understanding of industry priorities, holistic taxonomy, **global wealth management** opportunities, and actionable change mandates that can drive both sides of your balance sheet - either by reducing and/or **containing production costs** and/or improving the **value of financial advisors** through technology, quality improvements, and innovation.

DetectabilityAnalytics™ (DA) Leverages Failure Mode and Effects Analysis (FMEA) as a platform for intensive process review resulting in identification and prioritization of failure modes across the value stream. DA provides a distinct view by detecting the **severity and probability of operational, technical and process defects, gaps and errors**. Understanding causation provides the enterprise with a roadmap to **optimize and increase operational diligence, profitability, and cash flow.**

