

Powering Productivity & Growth

Osaic Institutions' Business Consulting Team

Osaic Institutions' Business Consulting Team proactively partners with you to deliver **resources, insights, and solutions** that power growth and operational efficiency. We support program and advisor goals to enhance productivity and allow you to focus on what matters most as you serve your clients, members, and communities.

Your Business Consultant is available to provide the following services:

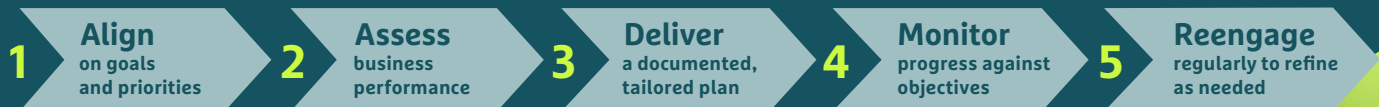
Program Managers

- Strategic program design
- Client experience and service model design
- Performance management and reporting
- Revenue growth and profitability analysis
- Technology utilization
- Compensation best practices
- Oversight and risk management
(in partnership with Compliance)
- Advisor recruiting support
(in partnership with Recruiting)
- Lead generation
(in partnership with Training and Development)
- Marketing support
(in partnership with Marketing Solutions)

Financial Professionals

- Complex issue resolution
- Business planning and practice growth
- Client segmentation and service model design
- Prospecting and referral support
- Career paths and succession planning
- Financial planning and practice management
(in partnership with Training and Development)
- Case design
(in partnership with Product Sales and Consulting)
- Technology and workflow support
(in partnership with Operations)

We use a proven, straightforward process to help you grow and optimize your practice:



For additional information, access the Business Consulting Team bio sheets. →

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