Strengths, Weaknesses, Opportunities & Trend Analysis Opportunities to exceed plan Trends Affecting Plan 1 Brand 1 Back Office inefficiences 1 Franchising Business at capacity 2 Alliances 2 Over-Reliance on Principal for New Opportunities 2 Outsourcing back office Accounting Firms reducing valuations Team Culture Sub-optimal workflows consuming resources and tim 3 New COIs Sources of new team members 4 Niches 4 Sub-Niche Development Amalgamation of suppliers

**Date Last Reviewed** 

11/02/2019

YOUR LOGO HERE

## MAGNA CHARTER v6-11 5 Awards

WAGNA CHARTER v6-11	5 Awards						_	5					
1. Culture/Values/Beliefs	2. Long Terr	n Targets	3. Yearly Performance			4. Quarterly Performance				5. Individual Bro	eakthroughs		
Perennial	3 Year Targets		Annual Smart Number Targets & YTD Results			Quarterly Smart Number Targets & Quarterly Results			Role Breakthroughs take Courage & Support to Achieve!				
Core Purpose	Year Ending	June 30, 2022	BY JUNE 30, 2019	i0, 2019 Yearly Target YTD Results		BY MARCH 31, 2019 Qtty Target Results		Specific Individual Team Member Breakthroughs					
Remove Financial Uncertainty from every client	Revenues	\$3,300,000	Revenues	\$1,500,000	\$1,055,800	Revenue	\$425,000	\$381,880	Team Member	Breakt		Due by	
	Ongoing Revenues	\$2,800,000	EBITDA	\$420,000	\$220,500	EBITDA	\$144,500	\$89,500	Ed	Goodwin Network Establishe		30/06/2019	
	EBITDA	40%	Ongoing Revenues -	\$1,100,000	\$950,000	Existing Client Revenue Uplifts	\$75,000	\$64,500	Stan	Deliver a small audience pre			
	Net Promoter Score	80	Annualised  Existing Client Revenue Uplifts		\$138,500	New Private Clients	3	1	Claire	Sign Private Client		30/06/2019	
	Team Satisfaction Rating	80	New Private Clients	8	4	New Alliances	1	1	Simon	Present Research Paper with	n Rural P.	30/06/2019	
	Team Turnover	<20%	New Alliances	2	1	Published White Papers	0	0	Alice	Chair Private Client Meeting		30/06/2019	
Core Values	Valuation (x EBITDA)	7	Published White Papers	2	1	Referral Rates	45%	40%	William	Ask for referral		30/06/2019	
Integrity			Referral Rates	50%	36%	Net Promoter Score	75	80	Naomi	Draft Research Paper Produ	ced	30/06/2019	
Creativity			Net Promoter Score	75+	70	Team Satisfaction Rating	80	95	Digby	2nd Chair for Private Client N	Meetings Fortnightly	30/06/2019	
Professionalism			Team Satisfaction Rating	80+	90	Client Engagement Rate	70%	85%	Cass	1st Chair Research Meeting		30/06/2019	
Leadership			Average Engagement	\$12,500	\$10,700	Average Engagement	\$12,500	\$12,100	Grant	Arrange Partial Sale of Clien	t Base	30/06/2019	
			Team Turnover	<20%	25%	Alliance Meetings	12	6	Mike	Engage Off-Shore Team Me	mber(s)	30/06/2019	
Durable Work Practices			Client Engagement Rate	70%	80%	Face Time	40%	37%	Paul	Replace Board Member		30/06/2019	
Specific, Methodical & Consistent The Way We Always Work						Advice Turnaround (days)	12	10					
No disrepectful clients													
No real or perceived conflicts	Market N Areas of Sp	eciality											
All pricing via pricing committee's job value standards	Pastoral Holdings/Mining     Valley)	Projects (e.g Hungerford											
No juniors will repeat careers of seniors - there must be leverage													
Uptodate Advice Maps for all clients always	2 Pastoral Succession - Family Office												
66% Fee Tension													
70% Renewable Income Streams	3 Rural Medical Specialists												
Max 10% Pro Bono Work													
	4												
	5												
	Breakthrough Achievements		Breakthrough Achievements										
	Significant Achievements  1 Office in Regional WA		Significant Annual Achievements  1 80% of Newbusiness not from founder										
	Olice III Negional WA		1 80% of Newbusiness not from founder										
	2 Office in Regional NSW or QLD		2 Implement 4 new COI relationships										
				.срс									
	3 4 National Niches (e.g. College of Anaesthetist)		3 Publish 3 new research pa	pers									
	1					<del> </del>							
	4 Annual Whole Firm Review in NZ		4 Complete automation of So	OA & CRM				+					
внас	5		5										
Big Hairy Audacious Goal													
To be the leader and most respected name in for	6		6										
valuable financial advice in our niches in Australia with offices in every capital city and New Zealand.							<u> </u>						
	7		7	On Track (to			On Track (to Qtr G	oals)					
						At least 80% of target							
	8		8			Less than 80% of budget							
										0.5	ginal Templet	(Gazelles com	
										On	ginal Templat <u>www.</u>	r.Gazelles.com	