



Day One: Defining the Service Line

- Welcome and Introductions
- Beginning with the End in Mind
- Generating New and Innovative Service Ideas
- Vetting New Service Ideas

Day Two: Building a Profitable Service Line

- Determining the Ideal Pricing Model
- Using leverage to drive profitability
- Pinpointing What Makes You Better

Day Three: Building the Foundation within the Firm

- Creating Alignment with Firm Leadership
- Designing Your Ideal Team
- Recruiting an Executive Sponsor and Internal Advocates
- Planning for Growth within the Firm

Day Four: Getting Your Services in Front of Your Clients

- Marketing Strategically Pre-Launch
- Marketing Strategically Post-Launch
- Driving Client and Pre-Client Actions through Marketing
- Developing Business as Trusted Advisors

Day Five: Putting It All Together

- Navigating the Process of Change and Creating a Plan
- Golden nuggets