**Advisory Work Checklist**

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| **Date Prepared:** |  |

Go over the following statements and check off the items that you have completed:

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|  | Completed? | As of date: |
| 1. I have analyzed my net profit margin, my practice’s strengths and weaknesses, and any threats and opportunities within the past year |[ ]   |
| 2. I have set my SMART goals for the year (Specific, Measurable, Attainable, Realistic, and Time-based)  |[ ]   |
| 3. I have drafted a value proposition |[ ]   |
| 4. I have analyzed how advisory services will fit into my practice and overall growth strategy |[ ]   |
| 5. I have addressed my capacity  |[ ]   |
| 6. I have defined and refined a process for advisory services. How will I track the growth of clients and the performance of the advisory function?  |[ ]   |
| 7. I have automated all that I can to make my practice more efficient |[ ]   |
| 8. I have identified how suitable clients will be approached  |[ ]   |
| 9. I have developed a marketing plan  |[ ]   |
| 10. I have my pitch ready |[ ]   |
| 11. I have evaluated my pricing strategy |[ ]   |
| 12. I have a delivery plan |[ ]   |