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Nota di contenuto	Introduction -- Management efficiency -- The efficient management philosophy -- Managing resources -- Managing people and communications -- Technology efficiency -- Client relationship management -- Afterword -- Impact on productivity, profitability, time management, and firm capacity -- Impact on business valuation -- First case study -- Second case study -- About the companion website -- About the author -- Index.
Sommario/riassunto	An essential guide to tools and techniques for achieving efficiency, productivity, and profitability in financial advisory firms As a profession, financial advisors have been very well educated on how to be a financial advisor, but the industry does a poor job of preparing financial advisors to be great business owners. This book presents the Profit-Driven Architecture, a visual way of viewing the operational structure of a financial practice. Provides a concrete way of understanding and improving the interrelationship of different parts of the operations of a financial pra