



GROWTH STRATEGY SESSION

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Broker

GROWTH STRATEGY SESSION



Agenda

- Where do you want to be – vision and goals
- Where are you now
- The challenges
- Top 3 takeaways and insights
- Problems
- Implementation Plan
- Recap and next steps

Segment 1

**Where do you
want to be**



THE VISION



What would **success** look like for you in
2 - 3 years from now?

A large rectangular area filled with a grid of small blue dots on a light gray background, intended for writing or drawing.

Where you want to be - The Detail



Your Role

Grid area for 'Your Role' notes.

Systems and Processes

Grid area for 'Systems and Processes' notes.

Team

Grid area for 'Team' notes.

Hours worked

Grid area for 'Hours worked' notes.

Lifestyle

Grid area for 'Lifestyle' notes.

Financials

1 Settlements

Grid area for '1 Settlements' notes.

2 Loan Book

Grid area for '2 Loan Book' notes.

3 Profit & Revenue

Grid area for '3 Profit & Revenue' notes.

Segment 2

**Where are
you now**



Where are you at now - The Reality

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Your Role

Systems and Processes

Team

Hours worked

Lifestyle

Financials

1 Settlements

2 Loan Book

3 Profit & Revenue

Segment 3

The challenges

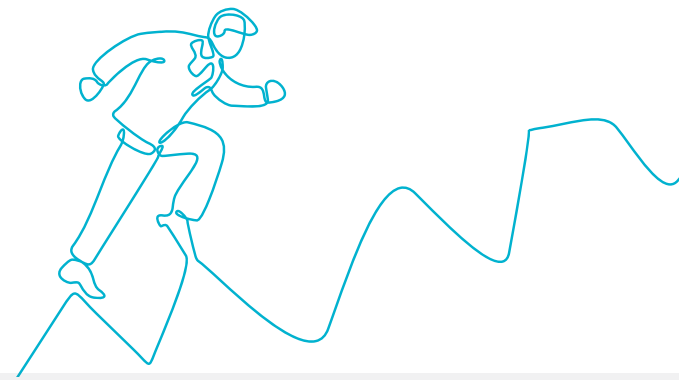
Challenges

What are the biggest challenges to take you from where you are now to where you want to be?

1

2

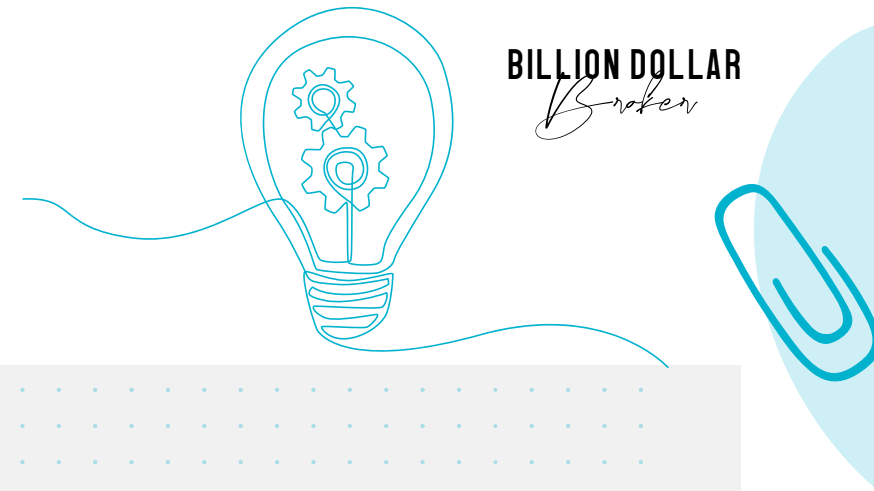
3



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Business Review **Insights**



What has been most beneficial and key takeaways so far?

1

2

3

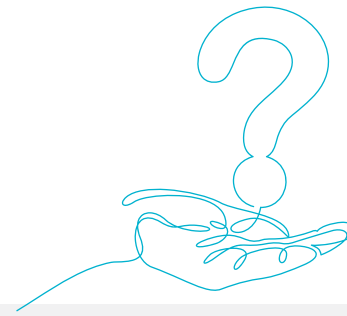
Segment 4

**How to
get there**



Problems

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My 3 Biggest problems to solve:

1

2

3

And the impacts are:

Implementation Plan

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Top 3 focus areas over the next 90 Days

1

2

3

NOTES



NOTES





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