

Building capacity into your business

Step 1: Start at a practice level



Total assets under administration	
Total clients	
Average assets per client	

Step 2: Assess your client base



	Top 20	The Next 40	The Next 90	Everyone Else
Total assets				
Average assets per client				
Percentage of book				
Yearly average revenue per client				

Step 3: Create an action plan



i.e. Create and document a tiered service model
