ON3 STRATEGIES
CLARITY. SYSTEMS. GROWTH.

TECHNOLOGY & CRM OPTIMIZATION

TURN YOUR CRM INTO YOUR FIRM'S OPERATING SYSTEM

THE PROBLEM

Most firms build a CRM to keep up with the day to day, not to run the practice. That works until the practice outgrows it, and what was once a helpful log turns into a database you fight with, and working for your CRM instead of it working for you

THE ON3 APPROACH

Turn your CRM into a working system, not a database you fight with. That's the standard across every pillar we work in:technology that runs the firm, not the other way around. We evaluate, optimize, and standardize your CRM so the practiceruns whether or not you're logged in.

PHASE 1: CRM ASSESSMENT FRAMEWORK

A full audit of your current CRM to identify gaps and establish a foundation for consistency.

1. **Data integrity:** Clean fields, removed duplicates, standardized firmwide.
2. **Settings & teams:** Default settings, synced integrations, defined roles.
3. **Tags & tiers:** Consistent tagging, aligned household tiers, annual review cadence.
4. **Activity & Workflows:** Standardized notes, audited workflows, flagged inefficiencies.
5. **Ongoing Maintenance:** Recurring audits, annual tier reviews, compliance triggers (RMDs, reviews, ADV filings).

PHASE 2: PRIORITIZE & OPTIMIZE

We focus on the highest-impact areas and build workflows that run on autopilot.

1. ESTABLISH PRIORITIES
2. WORKFLOW TEMPLATES
3. ACTIVITY & NOTE STANDARDIZATION
4. AUTOMATIONS MANAGEMENT
5. TECHNOLOGY INTEGRATION

PHASE 3: REPORTING & OVERSIGHT

Building reports that give you real visibility into operations and pipeline.

BUILT-IN REPORT TEMPLATES

Includes a variety of built-in report templates that make it easy to organize and analyze client, activity, and CRM data. These reports provide quick insights into key information without requiring users to build reports from scratch.

CUSTOM REPORTING

Custom reporting capabilities allow firms to create reports tailored to their specific needs by filtering and organizing CRM data. This provides greater flexibility for tracking client information, business activity, and other key metrics beyond the standard built-in reports.

WHAT WE HELP WITH

- CRM Health Assessment
- Pending & Placed Tracker
- Workflow Architecture
- Custom Reporting
- Automation Setup
- **Super Day Agenda** A full-day intensive with your team to map out everything your practice needs to run efficiently
- Technology Integration

READY TO STRENGTHEN YOUR TECHNOLOGY AND CRM?

Let's start the conversation.

Discover what a strategic partner can do for your business.

REQUEST A SAMPLE SERVICE MODEL

> Erik and his team rebuilt our systems, so client data moves automatically instead of being re-keyed by hand. The result: less time buried in paperwork, more time closing business. Simply put, I live and breathe better
>
> – Gregg Parker, Robert A. Parker Insurance & Financial Services