ON3 STRATEGIES
CLARITY. SYSTEMS. GROWTH.

PEOPLE & PERSONNEL DEVELOPMENT

HIRE BEFORE YOU NEED TO.

THE PROBLEM

Chase clients, get pulled into servicing them, business development drops off until the well runs dry, then the cycle starts over. It's not a crisis, it's a firm that isn't balanced, and it gets worse as the firm grows.

THE ON3 EQUATION

Not a single borrowed framework, **a customized equation built for each practice**, drawing on respected industry resources and 25 years of Erik's own experience rather than reinventing the wheel. An advisor serving wealthy retirees, business owners with complex planning needs, or government contractors specializing in TSPs needs a different equation than one serving blue-collar business owners or young professionals just starting out.

THE ON3 APPROACH

1. Hire slow, fire fast. On3 writes job descriptions, sits in on interviews, and doesn't rush the decision. When someone doesn't fit, On3 is in it with the advisor, not just advising from a distance.
2. The "Accordion" model: balance full-time anchor roles with flexible, part-time, or outsourced support, so staffing doesn't lurch between overstaffed and understaffed.
3. Compensation tied to performance, across admin staff, junior advisors, tenured advisors, and partnership-track hires, with simple, measurable KPIs for every role.
4. A collaborative growth path, built with the advisor, not handed to them, backed by On3's own training programs.

WHAT WE HELP WITH

- Team structure & role clarity
- Compensation strategy
- Hiring & termination support
- Performance criteria & KPIs
- Recruiting pipeline
- Career path & development
- Outsourcing/ Accordion staffing
- Culture & accountability

WHAT SUCCESS LOOKS LIKE

The right people, in the right roles, who know exactly what they own. Leadership that knows when to hire to keep up with growth, and how to keep good people and reward them for quality work.

Erik has personally sat in the room helping a client let someone go. It’s not easy, but it's what's right for the owner, the client, and the company.

> When two staff left at once, Erik told me it would be the best thing to happen to our firm. He was right. It led to a solid admin, a seasoned planner, and a junior who quickly became partner quality, the foundation we scaled on
>
> – Pete Marshall, Marshall Financial Group

READY TO STRENGTHEN YOUR PERSONNEL?

Let’s start the conversation.

Discover what a strategic partner can do for your business.

REQUEST A SAMPLE SERVICE MODEL