FIVE PILLARS

STRATEGIES
CLARITY. SYSTEMS. GROWTH.

PRACTICE ACCELERATOR

GROW BY DESIGN. MEASURE WHAT WORKS.

Most advisor training fades within a month. Advisors go back to business as usual, and leadership can't see what changed. Practice Accelerator fixes both.
On3's flagship program is a cohort-based development experience for firms and RIAs with advisor teams. It turns what advisors learn into what they do, and what they do into results leadership can measure. Eight core experiences across On3's Five Pillars, built around your firm, with tracks for every stage from new advisors to firm leaders.

EIGHT CORE EXPERIENCES

1 Kickoff and Assessment
Baseline every advisor across the Five Pillars. Set individual growth targets. ALL FIVE PILLARS

2 Mindset and Behaviors
Break the habits that stall growth and build the ones that drive it. PEOPLE & DEVELOPMENT

3 Business Development and Referrals
A deliberate market strategy and a referral ask that is made, documented and tracked. MARKETING & POSITIONING

4 Business Operations and Capacity
Reclaim time, delegate well and build the process for the next level. PEOPLE & DEVELOPMENT

5 Technology and Workflow
Put the tools your firm already provides to work. Adoption, not new software. TECHNOLOGY & CRM

6 Marketing and Communication
A clear value message, consistent visibility and active client and COI outreach. MARKETING & POSITIONING

7 Client Experience and Service Model
Segment the book and deliver service that earns loyalty and introductions. CLIENT EXPERIENCE

8 Plan of Action
A 90-day plan presented to leadership, tracked at 30, 60 and 90 days against each advisor's baseline. EXECUTIVE LEADERSHIP

BUILT AROUND YOUR FIRM

MIX AND MATCH
Weight the eight experiences toward what your firm needs most, whether that is referrals, marketing or capacity.

CADENCE SET WITH YOUR FIRM
Two sessions per month recommended, aligned to your timing and goals.

DELIVERY YOUR WAY
Virtual, in person or hybrid, set with your firm based on your needs.

GROWTH YOU CAN MEASURE

Every advisor is baselined at kickoff and measured at close, so leadership sees the difference between participants and non-participants, advisor by advisor.

Meetings Set	Referral Asks	Referrals Converted	New Clients and Assets	Revenue and GDC
per week	made and documented	to new clients	added in the period	start versus finish

WHAT'S BUILT IN

- Coaching built in. Initial, midpoint and final one-on-one check-ins for every participant.
- Real work, not homework. Stretch assignments tied to each advisor's own practice, with a peer accountability partner.
- Complements your firm. We reinforce the tools and programs your firm already offers rather than compete with them.
- Leadership readout. Progress, application and next steps for each advisor at the close of the cohort.

WHY ON3?

25 years inside advisor practices. Every client by referral. Progress over time, not a tidal wave.

LET'S BUILD YOUR COHORT.

Proven: one On3 client grew from $60M to nearly $1B in AUM in seven years.
Four steps to start: Growth Diagnostic, Select Participants, Set Dates and Format, Welcome and Kickoff.

Schedule your Growth Diagnostic. Scan or visit on3strategies.com/services