

## **A Case Study in Results-Oriented Business Planning – Greer Ducker, Edward Jones**

**The Challenge:** Greer Ducker is an Investment Representative who found himself struggling with some challenges in his business. He came to The Lattitude Group looking for assistance in defining and addressing those challenges:

- Marketing and positioning self-sufficiency.
- Cash flow improvement.
- Providing efficient and effective service to clients.
- Time management and delegation to assistants.
- Lack of experience in operating a business.
- New business generation.

**The Plan:** The Lattitude Group worked with Greer to outline his business objectives, determine progress to date, set realistic year-end goals, establish a plan of attack and measure success as the year progressed. His objectives included:

- Increase gross revenue while maintaining good service to clients.
- Diversify the business beyond current core market.
- Build specific product revenue.
- Create a value proposition of improved service and education as a path to access new individual investors.
- Build the organization with additional full-time assistants.
- Consistently have schedule fully booked with appointments, with one day set aside for “catch up.”
- Define clear business strategies on how to accelerate growth of the business and leverage Greer’s strengths (e.g. more speaking engagements, dinners, etc.).

**The Results:** Well before the end of the 12-month cycle, Greer found that he was making significant progress and had in fact already reached many of his goals.

- He received a bonus in IQ06 (the first since he opened the office).
- He had fewer transactions, but larger ones.
- He added a part-time assistant.
- He is now working fewer hours because he is more focused and productive.
- He is consistently growing monthly revenues and has revised his 2006 goals upward!

The process Greer and The Lattitude Group followed is one that can be customized for each individual and type of business. Contact The Lattitude Group today to find out how your business can attain the results it needs through a strategic thinking and business planning process.

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