

How We Do It!  
**backofficeadvisor**  
Every Step of the Way

Initial conversation(s) to determine if we're a good fit for each other

Signed confidentiality agreement from Back Office Advisor protecting client's proprietary information

Client completes Strategic Planning questionnaire (please see "Sample Worksheets" - "Planning Questions")

Strategic plan developed by Back Office Advisor in conjunction with Client

Conversations begin on action steps/discussion of challenges

"Hands On" implementation assistance begins

Accountability is established

Areas of weakness/needed improvement are identified

Minimum weekly call is established

Emails and "as needed" calls take place

Documents/templates are provided as needed by BOA

BOA provides resources as needed