Operations Consulting Services Menu

Available exclusively to Village Financial Services Fractional CSA client firms
Built for fee only RIAs working in Wealthbox, Redtail, Advyzon, or Slant, custodying at Schwab and/or Altruist.

We build systems that simplify operations, strengthen consistency, and protect personality.
Every engagement includes role based training so your team can confidently run what we build.

How This Works Alongside Your FCSA Engagement

- Operations consulting is a separate engagement. It is scoped, quoted, and invoiced apart from your Fractional CSA retainer and does not draw against your retained hours.
- Consulting builds the system. Your FCSA runs it. We design and configure the structure, standards, workflows, and automations, including the record work that falls inside a quoted CRM Migration engagement. CRM scrub work outside that scope, ongoing maintenance, and day to day execution stay with your FCSA at the standard FCSA rate.
- Every engagement is scoped and quoted individually. Your quote governs final pricing, timeline, and payment schedule.
- Payment is 50 percent at signing and 50 percent at completion unless your quote states otherwise.
- Work begins once the quote is approved, the agreement is executed, and the signing payment is received.

CRM Migration $3,500

For firms moving between CRMs, in either direction. A clean, well structured foundation from day one.

Who This Is For

- Firms migrating from one CRM to another and wanting the structure right before the data lands
- Teams that want households and accounts set up correctly in the new system from the start
- Firms that do not want to carry old data problems into a new platform
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where clean, reliable data is a measurable contributor to enterprise value

Timeline

Estimated duration: 3 weeks

- Weeks 1 and 2: Household and account structuring, field and naming standards
- Week 3: Delivery and team training

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Get households structured correctly in the new CRM • Ensure accounts are linked properly to the right households • Migrate records into the new CRM in accordance with the agreed scope • Perform the record cleanup, merges, deletions, and modifications that fall within the agreed migration scope • Define standards for contacts, naming conventions, and key CRM fields • Configure standard task management views so your team has visibility from day one • Provide best practices and train your team to work confidently in the new system	• Perform CRM scrub work outside the agreed migration scope, which runs through your FCSA • Build workflows, onboarding, review, or service processes, available as separate engagements • Set up client portal, fact finder, or risk tolerance standards, part of New Client Journey • Set up or configure billing, or integrations and automations, available as separate engagements • Set up or configure rebalancing or trading software • Provide ongoing data maintenance

Team training on everything we build is included in this engagement.

New Client Journey $6,500

The full journey from first prospect conversation to fully onboarded client. Pipeline management and onboarding in one seamless system.

Who This Is For

- Firms experiencing friction between a strong first meeting and actually onboarding the client
- Advisors with unclear handoffs between sales and operations
- Teams relying on memory or manual follow ups to move prospects forward
- Firms that want onboarding to feel as polished as their client relationships
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 5 to 6 weeks

- Weeks 1 through 4: Workflow design, build, and testing
- Weeks 5 and 6: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Build a standardized prospect pipeline with clear stage definitions • Define advisor and operations handoff points throughout the sales process • Set client portal, fact finder, and risk tolerance questionnaire standards, including integration into your workflow if you use an external portal • Build conversion workflows from verbal commitment through onboarding • Establish an end to end onboarding workflow aligned with your CRM and custodian specific instructions • Establish role based task ownership and internal checkpoints • Define client communication touchpoints during onboarding • Document exception handling for common onboarding delays, with automation where it makes sense	• Prepare, send, or submit paperwork on your behalf • Communicate directly with your clients on your behalf • Generate or qualify leads, or script advisor sales conversations • Build staffing or HR processes • Manage or configure billing, available as a separate engagement • Set up or configure rebalancing or trading software • Build integrations or API functions beyond what your CRM architecture and Zapier support • Troubleshoot data sync issues between your CRM and unsupported custodians

Team training on everything we build is included in this engagement.

Review Meeting & Scheduling — $4,500

A clear, repeatable meeting cadence that reduces friction and ensures follow through.

Who This Is For

- Firms with inconsistent meeting cadences across advisors
- Teams spending too much time coordinating, rescheduling, or chasing follow ups
- Firms where meetings happen but documentation and next steps are not consistent
- Advisors who want more time in client conversations and less time managing logistics
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 4 to 5 weeks

- Weeks 1 through 3: Workflow design, build, and testing
- Weeks 4 and 5: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Define standard meeting types and structure the firm meeting cadence • Establish clear scheduling rules and ownership between advisor and operations • Aid in client segmentation as needed • Build pre meeting and post meeting processes in your CRM • Create CRM activity standards for meeting documentation • Provide guidance on integrating your scheduling tool with your CRM	• Prepare, send, or submit paperwork on your behalf • Manage or schedule meetings on your behalf • Build firm wide calendars outside your CRM • Build staffing or HR processes • Set up or configure rebalancing or trading software • Build integrations or API functions beyond what your CRM architecture and Zapier support • Troubleshoot data sync issues between your CRM and unsupported custodians

Team training on everything we build is included in this engagement.

Service Processes $5,500

Consistent, customized workflows for every core client service event your firm handles.

Who This Is For

- Firms delivering great service but lacking consistency behind the scenes
- Teams handling service requests differently depending on the advisor or CSA
- Firms looking to scale without sacrificing service quality
- RIAs wanting clearer expectations for advisors and operations staff
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 5 to 6 weeks

- Weeks 1 through 4: Workflow design, build, and testing
- Weeks 5 and 6: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Build 15 to 20 fully customized service workflows, including account closure, account transfer in, address change, age of majority, beneficiary change, charitable donation, client death, client termination, email change, move money for contributions and distributions, firm wide RMD, RMD processing, Roth conversion, new account for an existing client, QCD, and rollovers for qualified retirement plans • Incorporate custodian specific step by step guidance across all processes • Establish well defined roles, servicing teams, and staff assignments configured to reflect how your firm actually operates • Customize each workflow based on team structure, external systems, priority and due date preferences, and email template language • Establish clear handoff standards so work moves seamlessly from one team member to the next • Configure task management views for visibility into what is due, who owns it, and how work is categorized	• Perform client service work • Manage compliance programs or create compliance policies • Set up or configure billing, available as a separate engagement • Build staffing or HR processes • Set up or configure rebalancing or trading software • Build integrations or API functions beyond what your CRM architecture and Zapier support • Troubleshoot data sync issues between your CRM and unsupported custodians

Team training on everything we build is included in this engagement.

Performance Reporting $2,500

A reporting package your clients understand and a delivery process that runs the same way every cycle.

Who This Is For

- Firms assembling performance reports by hand each quarter
- Teams where reports go out late, or look different depending on who prepared them
- Firms unsure what their reporting package should contain or how it should be presented
- Advisors who want reports reviewed before clients see them, not after
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 3 to 4 weeks

- Weeks 1 and 2: Report package design, configuration, and testing
- Weeks 3 and 4: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Define the report package: content, sections, benchmarks, and formatting standards • Configure the reports in your portfolio management and reporting system • Establish the cadence the reports run on and the calendar that drives it • Assign clear ownership for preparing, reviewing, and releasing each cycle • Define the delivery path, whether emailed, published to the client portal, or posted to the vault • Document the process as a workflow or task template in your CRM so it runs the same way every cycle • Build review checkpoints so reports are checked before they reach clients	• Prepare, review, or distribute performance reports on your behalf each cycle • Reconcile or correct historical performance data • Provide investment advice, or guidance on performance calculation methodology or GIPS compliance • Perform data cleanup in your portfolio accounting system outside the agreed scope • Set up or configure rebalancing or trading software • Build integrations or API functions beyond what your CRM architecture and Zapier support

Team training on everything we build is included in this engagement.

Integration & Automation

Priced per engagement

Get your systems talking to each other. Scoped as a single engagement covering the analysis and the builds that come out of it.

> Your investment is quoted after our intro conversation, once we understand your tech stack and what is realistically possible on it. That figure covers a formal integration and automation analysis and the builds that follow from it, and it holds for the scope we agree. If something materially larger comes up along the way, we will talk it through and scope it separately rather than quietly absorb it.

Who This Is For

- Firms with CRM integrations that feel underused, misconfigured, or unreliable
- Teams re entering data by hand because systems are not talking to each other
- Firms adding new tools such as financial planning software, meeting note takers, scheduling tools, data aggregation, or custodian digital workflows, and wanting them connected properly
- Firms that want to know what is actually possible across the tools they already pay for
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 3 to 4 weeks

- Weeks 1 and 2: Integration and automation analysis, configuration, and testing
- Weeks 3 and 4: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Run a formal integration and automation analysis across your current tech stack, establishing what can be connected natively, what needs third party automation, and what is not worth automating • Deliver a prioritized roadmap of what is possible on your stack • Configure and optimize your CRM native integrations, including custodial feeds and client portal • Connect and automate third party tools using Zapier so your systems work together, including planning software, meeting note takers, scheduling tools, data aggregation, and custodian digital workflows • Align integration and automation settings with your workflows so data lands where your team needs it • Establish data hygiene standards and checkpoints to keep synced data clean and reliable • Troubleshoot and resolve data sync issues between your CRM and your connected systems • Document how each integration and automation works and train your team to use and maintain it	• Build fully custom coded API integrations beyond what your CRM native connectors and Zapier support • Purchase or manage licenses and subscriptions for third party software on your behalf • Set up or configure rebalancing or trading software • Provide ongoing integration or automation monitoring, which runs through your FCSA

Team training on everything we build is included in this engagement.

Billing Setup

$2,500

A clean, reliable billing system your team can run with confidence every cycle.

Who This Is For

- Firms setting up billing in a new system for the first time, or cleaning up an inconsistent setup
- Teams unsure their fee schedules, billing groups, or calculations are configured correctly
- Firms that want billing to run predictably each cycle without manual workarounds
- Firms that want new hires to get up to speed quickly
- Firms building toward a transition or sale, where documented, repeatable processes are a measurable contributor to enterprise value

Timeline

Estimated duration: 3 to 4 weeks

- Weeks 1 and 2: Billing configuration and testing
- Weeks 3 and 4: Team training and rollout support

What We Do and Do Not Do

What We Will Do	What We Will Not Do
• Configure fee schedules, billing groups, and householding logic to match how your firm bills • Set up billing frequency, calculation methods, and custodial fee deduction handling • Establish standards for billing documentation and reporting • Test billing calculations against sample accounts to confirm accuracy before go live • Document the billing process and train your team to run each cycle	• Act as your billing agent, or calculate, submit, or debit client fees on your behalf • Provide legal, compliance, or fee disclosure advice • Reconcile or correct historical billing discrepancies outside the agreed scope • Build integrations or API functions beyond what your CRM architecture and Zapier support • Troubleshoot data sync issues between your CRM and unsupported custodians

Team training on everything we build is included in this engagement.

Bundle Pricing

When three or more engagements are purchased together, each receives a 10 percent discount. Bundled engagements ensure systems are built cohesively, adopted properly, and designed for long term efficiency.

Illustrative example, the three core workflow builds:

Engagement	Individual	Discount	Bundle
New Client Journey	$6,500	-$650	$5,850
Review Meeting & Scheduling	$4,500	-$450	$4,050
Service Processes	$5,500	-$550	$4,950
Bundle Total	**$16,500**	**-$1,650**	**$14,850**

Illustrative example, a migration focused setup:

Engagement	Individual	Discount	Bundle
CRM Migration	$3,500	-$350	$3,150
Billing Setup	$2,500	-$250	$2,250
Performance Reporting	$2,500	-$250	$2,250
Bundle Total	**$8,500**	**-$850**	**$7,650**

Engagements may be completed sequentially or, for firms with sufficient bandwidth, in a modified parallel structure. Sequencing recommendations are provided during scoping. Integration and Automation is priced per engagement, so it is not shown in the illustrative totals above. It counts toward the three engagement threshold and receives the same 10 percent discount when bundled.

What Stays With Your FCSA

Operations consulting designs and builds the system. Running it, maintaining it, and the hands on record work that goes with it stay inside your Fractional CSA engagement at the standard FCSA rate of $100 per hour, drawn from your existing retainer. That includes:

- CRM scrub work, meaning manual record cleanup, merges, and edits outside the scope of a quoted CRM Migration engagement
- Ongoing data maintenance and CRM hygiene
- Day to day execution of the workflows we build
- Ongoing monitoring of integrations and automations
- Running each performance reporting cycle once the process is built
- Small adjustments and refinements after an engagement closes

If the work is larger than a refinement, it is scoped as a new engagement rather than absorbed into your retainer. We will tell you which it is before any work begins.