



## Advyzon Consulting & Buildout Services Menu

*Built for RIAs using Advyzon with Schwab and/or Fidelity as custodian.*

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We build systems that **simplify** operations, **strengthen** consistency, and **protect** personality.

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### Review Meeting & Scheduling | \$6,500

*Create a clear, repeatable meeting cadence that reduces friction and ensures follow-through.*

#### Timeline

**Estimated duration: 4 - 5 weeks total**

- **Weeks 1-3:** Workflow Design, Build, & Testing
- **Weeks 4-5:** Team Training & Rollout Support

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Define standard meeting types and structure meeting cadence</li><li>• Establish clear scheduling rules and ownership (advisor vs. operations)</li><li>• Build pre- and post-meeting processes in Advyzon</li><li>• Create CRM activity standards for meeting documentation</li><li>• Provide guidance on integrating scheduling tools with Advyzon</li></ul>	<ul style="list-style-type: none"><li>• Manage or schedule meetings on your behalf</li><li>• Customize workflows differently for individual advisors</li><li>• Build firm-wide calendars outside of Advyzon</li><li>• Enforce advisor compliance beyond documented standard</li></ul>

#### **Who This Is For**

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- Advisory 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 aren't consistent
- Advisors who want more time in client conversations and less time managing logistics

# Prospect to Client | \$5,750

*Standardize how prospects move from first conversation to signed client.*

## Timeline

### Estimated duration: 4 weeks total

- **Weeks 1-2:** Workflow Design, Build, & Testing
- **Weeks 2-4:** Team Training & Rollout Support

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Design a standardized prospect pipeline with clear stage definitions</li><li>• Define advisor and operations handoffs during the sales process</li><li>• Build conversion workflows from verbal commitment to onboarding</li><li>• Create CRM task templates and automation to support consistency</li><li>• Document expectations for prospect follow-up and tracking</li></ul>	<ul style="list-style-type: none"><li>• Generate or qualify leads</li><li>• Rewrite or script advisor sales conversations</li><li>• Manage prospect communications directly</li><li>• Maintain or update the pipeline after implementation</li></ul>

## 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 looking to improve conversion without scripting advisor conversations

# New Client Onboarding | \$6,000

*Deliver a consistent, low-stress onboarding experience for both clients and staff.*

## Timeline

### Estimated duration: 4 weeks total

- **Weeks 1-2:** Workflow Design, Build, & Testing
- **Weeks 2-4:** Team Training & Rollout Support

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Design an end-to-end onboarding workflow aligned with Advyzon and Schwab</li><li>• Define role-based task ownership and internal checkpoints</li><li>• Create standardized onboarding task templates in Advyzon</li><li>• Outline client communication touchpoints during onboarding</li><li>• Document exception handling for common onboarding delays</li></ul>	<ul style="list-style-type: none"><li>• Prepare, send, or submit paperwork on your behalf</li><li>• Communicate directly with clients</li><li>• Customize onboarding workflows for individual households</li><li>• Manage ongoing onboarding cases after implementation</li></ul>

## Who This Is For

- Firms onboarding new clients inconsistently or reactively
- Teams where onboarding feels stressful, rushed, or overly manual
- Advisors who want a professional, predictable client experience from day one
- Firms using Advyzon and Schwab but lacking a standardized onboarding system

## Service Processes | \$4,750

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*Built for RIAs using Advyzon with Schwab and/or Fidelity as custodian, including over 15 customizable service processes such as firm-wide RMD management, client death, termination, rollovers, and ongoing client maintenance.*

### Timeline

#### Estimated duration: 4 weeks total

- **Weeks 1-2:** Workflow Design, Build, & Testing
- **Weeks 2-4:** Team Training & Rollout Support

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Identify and document core recurring client service workflows</li><li>• Align service processes to service tiers, where applicable</li><li>• Create CRM task templates for common service requests</li><li>• Build an annual service calendar to support proactive planning</li><li>• Define CRM documentation standards for service work</li></ul>	<ul style="list-style-type: none"><li>• Perform client service work</li><li>• Create bespoke workflows for one-off or rare requests</li><li>• Enforce service standards or advisor behavior</li><li>• Maintain or update workflows after delivery</li></ul>

### Who This Is For

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- 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

# CRM Clean-Up | \$3,500

*Make Advyzon reliable, usable, and ready to scale.*

## Timeline

### Estimated duration: 3 weeks total

- **Weeks 1-2:** CRM Review, Diagnostics, and Recommendations
- **Week 3:** Delivery & Training

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Define standards for households, contacts, and naming conventions</li><li>• Normalize key CRM fields and pipeline stages</li><li>• Provide post-cleanup best practices to maintain consistency</li><li>• Advise on what “good” looks like going forward</li><li>• Identify cleanup priorities and provide a structured cleanup plan</li></ul>	<ul style="list-style-type: none"><li>• Manually clean or edit CRM records</li><li>• Merge, delete, or modify records on your behalf</li><li>• Resolve historical data issues outside agreed scope</li><li>• Provide ongoing data maintenance</li></ul>

## Who This Is For

- Firms that don't fully trust the data in their CRM
- Teams struggling with inconsistent household structures, naming, or fields
- Advisors avoiding CRM use because it feels cluttered or unreliable
- Firms planning new workflows and wanting a clean foundation first

# Advyzon Basics, Training & Best Practices | \$2,750

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*Ensure your team uses Advyzon correctly and consistently.*

## Timeline

**Estimated duration: 3 weeks total**

- **Weeks 1-3:** Team Training & Best Practices Support

What We Will Do	What We Won't Do
<ul style="list-style-type: none"><li>• Deliver role-based training for advisors, planners, and operations</li><li>• Establish daily, weekly, and monthly CRM usage habits</li><li>• Review dashboards, reports, and common workflows</li><li>• Share best practices and common pitfalls to avoid</li><li>• Provide adoption guidance tied to implemented workflows</li></ul>	<ul style="list-style-type: none"><li>• Train on custom workflows not included in the engagement</li><li>• Provide unlimited or ongoing training sessions</li><li>• Act as ongoing system support</li><li>• Troubleshoot unrelated technical issues or integrations</li></ul>

## **Who This Is For**

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- Firms using Advyzon but not consistently or confidently
- Teams with different interpretations of how the CRM should be used
- New hires who struggle to get up to speed quickly
- RIAs who want Advyzon to support daily work, not create more of it

## **Bundle Discount**

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Receive a **15% discount** when three or more packages are purchased together. Bundled engagements ensure systems are built cohesively, adopted properly, and designed for long-term efficiency.