



The four success drivers of winning firms

**How managed accounts can drive scale
and sustainable growth**

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Important information



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In today's session



Today's macro environment



4 success drivers of winning advice firms



Understanding the benefits of scale and planning for growth



Case study and discussion: Elston

The 4 success drivers of winning advice firms



1 Make better decisions
and execute
successfully

2 Have a strong,
differentiated
proposition

3 Understand the
benefits of scale
and have a plan for
sustainable growth

4 Encourage a culture
of ownership

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Benefits of a differentiated proposition



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The benefits of scale



3 Understand the benefits of scale and have a plan for sustainable growth

- Understand the power of growth and the benefits of scale
- Have a plan to simplify their model, outsource non-core activities and introduce technology to improve technology and efficiency.

Discussion



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