



**Prepared for:** Scandal Financial

**Date:** April 1, 2024

**BRAND PURPOSE/MISSION:** “To educate and empower our clients to obtain financial control through the adoption of progressive, customized, long-term insurance solutions and investment strategies that provide protection, guaranteed growth and wealth accumulation, while eliminating unnecessary risk”

**BRAND VISION:** To create an opportunity for greater economic independence for North Americans by guiding them to be more financially in control of their lives so they can experience prosperity and fulfill their goals and dreams.

**BRAND VALUES:**

- **Honesty** - We speak the truth and are genuine; we foster a culture of transparency and self-expression
- **Trustworthiness** - We cultivate client relationships for life; our client’s best interests are our best interests.
- **Accountability** - We practice responsible governance, business acumen, and teamwork; we have a responsibility to each other and our clients.
- **Choice** - We work with clients to achieve financial control for life; we provide solutions and options based on their needs and values.
- **Education** - We see knowledge as a source of empowerment for our clients and team; we promote education from within for this purpose.
- **Innovation** - We are progressive and think beyond the status quo; we explore the financial road less travelled in search of opportunity.

**2024 Goals:**

- 4 Million revenue
- Paperless operations | Client Portal
- Build a referral campaign
- CEO to focus more on her CEO role
- Hire an operations manager
- Solidify employee roles.

### Initial recommendations:

- The CEO has too much on her plate and is not able to step into her CEO role. I recommend hiring an operations manager to handle the internal operations. Role details will be listed below under team recommendations.
- In an attempt to maximize all current positions I recommend looking into all roles and ensuring that everyone is working in their zone of genius and maximizing their time.
- In an attempt to go paperless a client portal should be established. This should be explored further.

### CURRENT TEAM:

#### **Olivia Pope**

- **CEO:** Business strategies, major corporate decisions, setting goals, policy development, business negotiations, oversees assets and liabilities, HR.
- **Chief Compliance Officer:** Anything to do with corporate or industry compliance. Policy development, implementation and enforcement
- **Chief Operations Officer:** Overseeing and managing the company and keeping things on track, and adhering to budgets.

#### **Quinn Perkins**

- Company Finances
- Director of Sales

#### **Mellie Grant**

- Manager of executive services - Processing policy requests, sales and office related admin.

#### **Cyrus Beene**

- Administrative Assistant - Office and Sales related admin.

#### **Fitzgerald Grant**

- Internal and external communications
- Branding
- Marketing
- Advertising

#### **Jake Ballard**

- InfusionSoft and IT Specialist

#### **David Rosen**

- Accountant

#### **Huck knowsitall**

- Videographer

#### **Elizabeth North**

- Podcast manager

### Team Recommendations:

- Incorporate an operations manager/ Chief operations officer. This position should include the following:
  - Overseeing and managing the company and keeping things on track, and adhering to budgets.
  - Assistance in developing business strategies and setting goals.

- Overseeing staff this includes team meetings and managing KPIs.
- Olivia's workload should decrease as she steps into her CEO role. Her duties should include
  - Business strategizing to scale the business
  - Working 1 on 1 with agents
  - Policy development and implementation
  - Writing and speaking
  - Building relationships and partnerships.
- After reviewing Fitzgerald's review I recommend frequent 1:1s with the operations manager to help improve the role.

### PROCESS/SYSTEM ASSESSMENT:

During the operations review it was evident that there are quite a few gaps when it comes to the systems in place. These gaps interfere with the process flow and should be addressed.

- There is an overlap between Google Drive and Microsoft teams.
  - **Recommendation:** Move everything into Google Drive. Add google workspace.
- There doesn't appear to be a process for keeping track of projects and tasks.
  - **Recommendation:** Olivia uses Asana. I recommend having the entire team use Asana. This will allow everyone to be on the same page and will allow everyone to keep track of deadlines. This will make it much easier for the operations manager to make sure that everything is getting done.
- There is no marketing calendar.
  - **Recommendation:** In terms of marketing and social media there needs to be a process in place to make sure marketing is consistent in all of the different areas. The use of a social media calendar and project management tool should be explored. [Asana](#) is a great tool for this.

### Next steps:

- Review your [90 day roadmap](#):
  - Carefully evaluate your 90-day strategic plan. Reflect on whether the outlined actions and milestones are in sync with your intended objectives. In case any discrepancies arise or you wish to propose changes, promptly reach out to Louisa for discussion and potential revisions.
- Review and accept provided Quote
- Schedule a kick-off meeting
  - A link will be sent after the quote is approved.

