

Wipfli's Prime Perspective

Accelerate growth, increase efficiency,
improve organizational health and expand
the financial strength of your organization.



WIPFLI

Undefined leadership. Technology gaps. Strategy misalignments.

In today's dynamic business landscape, organizations are recognizing the critical importance of accelerating growth, increasing efficiency, improving organizational health and expanding financial strength.

To thrive, organizations need to operate in a prime state where seven key components of a business are aligned to create velocity and momentum.

These seven components of Wipfli's Prime Operating Approach aren't independent.

If you are weak in even just a single component, you risk getting stuck in traps that don't just stall your potential — they erode it.

Wipfli's Pathway to Prime is a journey any organization can navigate with the right road map.





**When you operate
in a prime state, your
organization is more:**

**Viable
Stable
Sustainable
Profitable**

**Valuable
Resilient
Transferable**



Wipfli's Prime Perspective

Transformational leaders share a focused vision and plan with an engaged team.

Compelling vision

Do you have a focused vision and plan?

To create that vision, you must engage and involve your people. That means everyone from all levels, including advisors, leaders, technology teams, support staff and marketing. The more they help create it, the more motivated they will be to achieve it.

The more people you involve in your vision, the more perspectives you will get. Those different perspectives will help close gaps in your goal that you might not see.

A compelling vision includes a transformational strategy, defined goals and action steps that drive process and accountability.

A man with glasses and a blue shirt is pointing upwards with a red pen in a meeting. The background is a blurred office setting. A blue overlay on the left contains white text.

95%

of employees, on average,
are unaware of or do
not understand their
firm's strategy.

Transformational leadership

Do you have high-impact leadership teams who will inspire and motivate while also driving actions and accountability?

The four I's of transformational leadership are:

- **Idealized influence:** Role models who are purpose-driven high achievers
- **Inspirational motivation:** Have a clear vision that is inclusive and optimistic and inspires others
- **Individual consideration:** Empathetic and focused on the needs of others
- **Intellectual stimulation:** Challenges others to be innovative and creative

Today, transformational leadership is more important because a team who follows rules without question will not grow your company and meet tomorrow's challenges.

It's also more achievable than ever before. Organizations are experiencing a historic four-generation workforce, with baby boomers, Generation X, millennials and Gen Z all working together.

Switch from the old command-control style of leadership and adopt one that is more inclusive and collaborative.



Wipfli's Prime Perspective

Leaders must drive change, lead transformation and inspire others to participate in the vision while also developing future leaders at every level of the organization.



40%

of employees who leave say it's because leaders did not invest in them and they did not see any growth opportunities.



Wipfli's Prime Perspective

A highly energized and engaged culture is crucial to helping you achieve your vision. By inspiring employees and investing in their success, you are more likely to have a highly energized and engaged culture.

Engaged people

Do you have an energized, engaged culture?

Employees will engage at a high level if they know their ideas are helping shape the direction of the organization, that they're empowered to make decisions and that you are coaching them to be the next generation of leaders.

When crafting your compelling vision, don't forget to include goals for culture, collaboration and career development. Add plans to your process for regular pulse surveys so they know you are listening, as well as one-on-one career goals sessions and input on benefit packages, to name a few.

In addition to driving your organization into optimal performance, an engaged culture can give you the edge in the fierce competition to hire and retain top talent.



91%

of consumers
look for
authenticity
in a brand.

73%

look for
seamless
customer
experience.

Thriving brand

Do you have the messaging that resonates and sells?

Organizations in prime know their brand story and have built it around a powerful client experience. And in order to do that, you must truly understand what your target client wants and how your company delivers.

That means you must listen to your clients. It can be through surveys, interviews, focus groups, industry research or digital analytics.

Once you understand their needs, you can start to map the ideal customer journey by identifying all your touchpoints and the experience they have at each. That includes building your brand promise, creating your value proposition and determining your brand differentiators.

With this information in hand, you can develop a brand message aligned with your compelling vision that also resonates with your ideal clients and inspires your employees.



Wipfli's Prime Perspective

Organizations with a thriving brand understand who they are and how to tell their story. Their brand comes to life in every interaction.



80%

of organizations conducting
process improvement projects
will experience an internal
rate of return better than 15%.



Wipfli's Prime Perspective

To efficiently and effectively deliver an optimal client experience, organizations must align their operations, technology and people.

Operational excellence

Have you achieved sustainable and scalable growth?

Here is where your compelling vision, transformational leadership, invested stakeholders, financial confidence, thriving brand and technology come together. If done right, you'll achieve operational excellence so you can sustain and scale growth.

Successful growth depends on efficient operations, which means closely evaluating the efficiency of every process in the workflow. This includes everything from client relationship management and performance assessments to regulatory adherence and the essential financial and business processes that sustain daily operations.

And a modernized, cohesive digital strategy can improve process efficiencies, generate data to drive decisions, free up time for clients and give clients a better user experience.

You have achieved true operational excellence when you are executing business strategy on a consistent and reliable basis, increasing revenue and decreasing risk and cost — all while delivering an uninterrupted, excellent client experience.

65%

of businesses fail
after 10 years.

ONLY

20.8%

fail within
the first year.



Financial confidence

Do you have the financial flexibility to be resilient in hard times and grow?

Companies in prime understand that true financial confidence comes from viewing the organization as a business, evaluating the cost and profitability of client relationships and completing in-depth financial analyses. Plan for your future, whether that involves M&A, growth or sales. And ensure you have the right people, processes and resources to achieve them.

It all starts with an in-depth analysis of your company's financial performance by stress-testing your finances, building an actionable scorecard, clarifying financial drivers and cash flow and setting a budget and pro forma.

Longevity also doesn't equal security. In fact, failure rates increase over time as businesses grow and start to stretch without the financial strategy and controls to guide them.



Wipfli's Prime Perspective

Successful organizations evaluate all financial and compliance metrics to determine current and future state gaps and opportunities, ensuring the financial foundation is always strong.

\$1.8T

a year is lost in productivity
due to outdated technology
in U.S. businesses.





Wipfli's Prime Perspective

Optimize your technology by untangling legacy systems, building strategy first and buying tech second, and using tech to be more responsive to customers.

Technology optimization

Are your organization's people, processes and technology aligned?

With increasing competition and client demands, organizations can no longer afford to just dream about the tech they need. If they don't make \$1.8 trillion tech changes now, they will lose clients, recruits and revenues.

- Streamlined and secure client onboarding and document handling
- Integrated content management systems to store documents for fast, easy retrieval

Technology optimization is driven by your processes, workflows and strategy — it does not dictate it.

Start by outlining your needs, then look for tools to help you accomplish them, such as:

- Unified data platform with efficiency and transparency
- Customer relationship management solutions that integrate with your other applications, such as marketing software

Pulling all processes, workflows and integrations into a cohesive tech stack also gives leadership better insight and more accurate information about how the company is running — and that can help to facilitate the the other components of prime.

Are you operating in a prime state?

Wipfli's Pathway to Prime uncovers powerful incentives so you can achieve optimal performance and enable your organization to become future-ready.

You gain the benefit of greater productivity today and the agility and resilience to keep generating greater overall business value.

Because each organization has unique strengths and weaknesses, Wipfli's Pathway to Prime is not the same for everyone — nor is it linear. Nor are our components independent; they are intertwined.

All of our seven components contain some recurring themes — strategy, collaboration, execution and transformation.

If you follow them on Wipfli's Pathway to Prime, it will help you achieve:

Better business outcomes

- Increased efficiency and profitability
- Improved shareholder experiences

Increased agility

- Greater speed to market
- Better client experiences
- More service innovation
- Stronger workforce

Greater resilience

- Increased workforce engagement
- Improved staff retention
- Enhanced ability to perform under stress

Wipfli's Prime Perspective:

Align your technology, talent, operations and processes with business strategy to improve operating models.

How we can help you reach a prime state

It starts with Wipfli's Prime Rapid Assessment — built on research and data — to assess where you are today in our seven components.

Then we work with your executive team in a series of facilitated sessions to elevate your performance in the components that you need the most.

With Wipfli's Prime Growth System, you can walk away with a focused vision and plan, high-impact leadership teams, an energized culture, brand messaging that resonates and sells, sustainable and scalable growth, financial freedom and alignment of people, processes and technology.



How we get started

01

Introduction call

Wipfli's cross-functional team will meet with your executive team to learn about your key business needs and prep for Wipfli's Prime Rapid Assessment.

02

Wipfli's Prime Rapid Assessment

Complete our assessment to identify gaps and opportunities around the seven components of prime.

03

Prime engagement

Schedule a prime findings call to review results and receive guidance on how your organization can reach prime.

Ready to change the trajectory of your business?

We are.

Start your journey at wipfli.com/prime.

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