



Ensure your firm runs optimally with the right staff in the right roles. Identify overlap and overload, and make sure everyone knows their operational responsibilities. Filling out the Staff Weekly Assignment Matrix below is a helpful exercise and can be routinely reviewed with every new hire, promotion, or staff departure.

## **NAME & DEFINE ADVISOR SERVICING TEAM**

e.g. John Advisory Team; individual(s), ops team 1, junior advisor, etc.

WEEKLY RESPONSIBILITY MATRIX					
Example: Prospecting	Kirsten	Nicole	Stephanie	John	90 mins
Client Meetings					
Meeting Preparation					
Compliance Review					
Client Communications					
Firm Technology					
Prospecting					
Internal Communications					
Marketing					
Market Research					
Preparing Client Documents					
Other Processes (fill in your unique needs)					