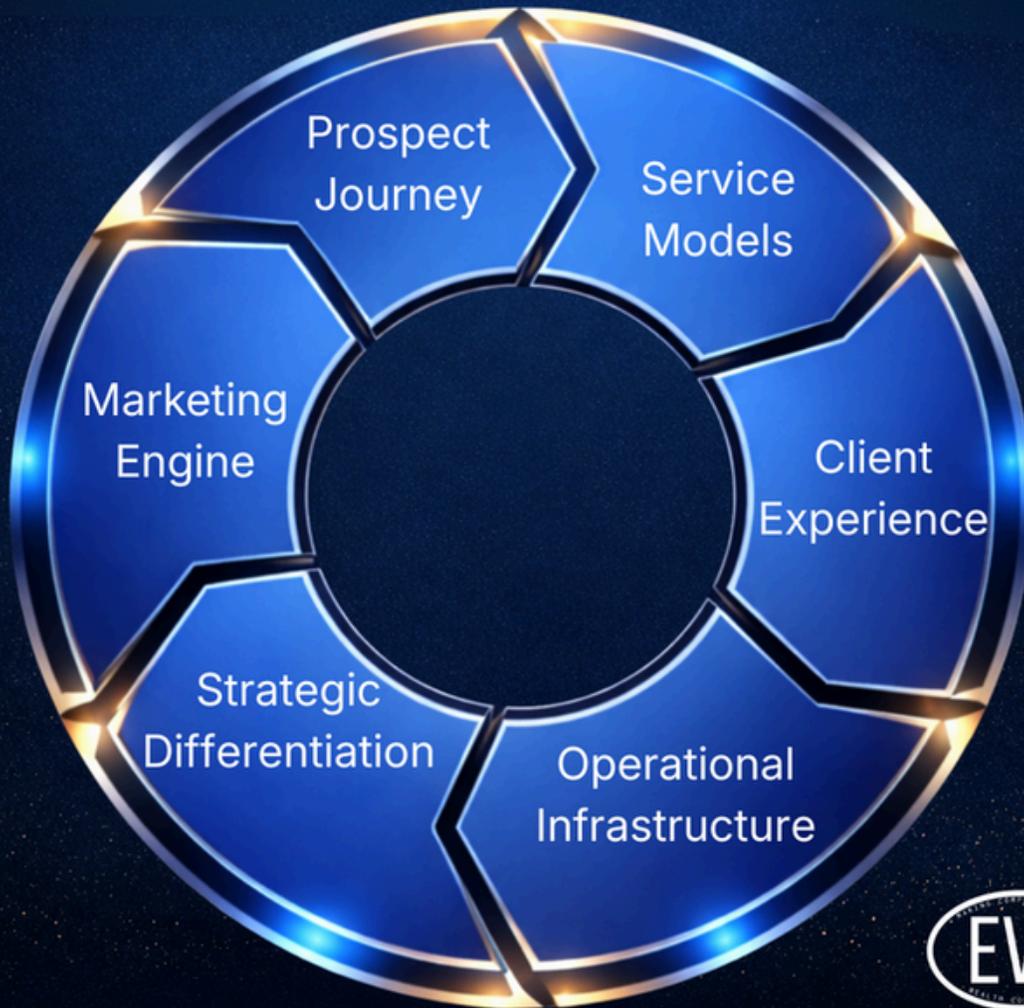


# RIA Growth Flywheel



**Durable Growth Starts  
with the Operating System**  
Evaluate Before Taking Action

*For Growth-Focused  
RIA Leadership*

Mike Casciano  
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# Current Approach vs Flywheel

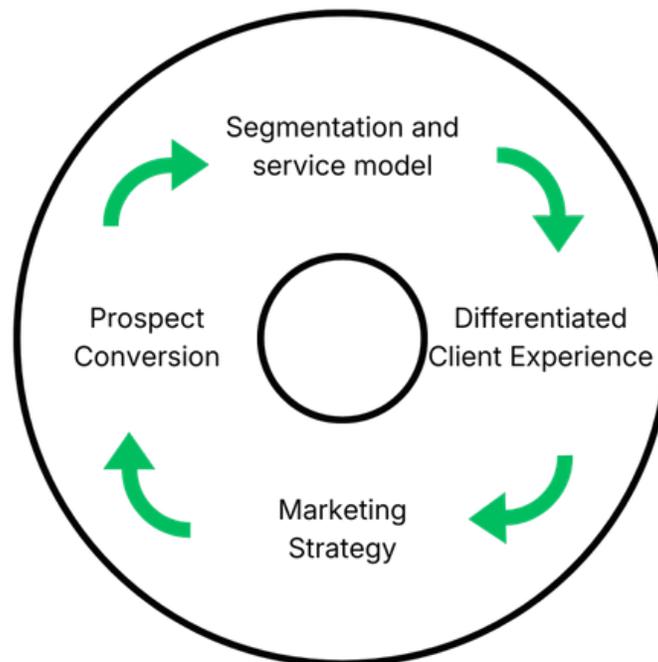
Most RIAs improve one function at a time.

- Marketing strategies get funded
- Technology gets replaced, AI is bolted on
- Services, resources, and people are added

But episodic improvements rarely create durable growth.

A flywheel is different.

It is an integrated operating system where each component is engineered to continuously strengthen the next.



The challenge is that the flywheel needs to be completed before it can be set in motion.

The result is not just growth, it is scalable infrastructure that creates momentum.

# **The RIA Flywheel Engagement**

**A structured two-day session designed to evaluate the current operating system and provide custom options to improve growth and efficiency.**

## **Day 1: Discovery (3 hours)**

Discuss company history, story, and goals.

Examine current strategy, process workflows, and technology across the six components of RIA growth.

Each component has three key themes that are scored from 1 - 3.

1 - Target for Improvement

2 - Satisfactory

3 - High efficiency and differentiated

## **Day 2: Assessment & Strategic Roadmap Delivery (3-4 hours)**

You receive:

- Flywheel Alignment and Component Scoring
- Differentiation and Value Visibility Assessment
- Component enhancement options for strategy, process, existing technology, new technology
- Margin and capacity unlock opportunities
- Best practices from similar firms

**The result is a custom operational roadmap providing: Documentation. Options. Immediate Activation.**

**Delivered in days... not months.**

# 6 Components of the RIA Growth Flywheel

## Marketing Engine

Builds a predictable pipeline of high-value, right-fit prospects by leveraging strategic differentiation and brand awareness.

## Prospect Journey

Converts high-quality prospects into committed clients through a structured, efficient, and value-driven decision process.

## Service Models

Architects economically disciplined, segmented service models that align client value, pricing integrity, and scalable capacity.

## Client Experience

Makes value visible through structured and consistent clarity and understandable context to create client confidence and engagement.

## Operational Infrastructure

Aligns technology, data, and operational workflows to reduce friction, improve margins, and power scalable differentiation.

## Strategic Differentiation

Defines and operationalizes a differentiated value proposition that attracts right-fit clients and fuels long-term durable growth.

# Day 1 - Discovery

## *Marketing Engine*

1. How is the current messaging applied across value proposition, service model, website, content, client and prospect materials?
  2. Document existing lead generation process for referrals (client and COI), digital marketing, events, and Ideal Client Profile (ICP) targeting.
  3. How do you manage KPIs for marketing budget, prospect funnel stages, net new growth, and lead conversion?
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## *Prospect Journey*

1. Document current process for prospect data aggregation, pre-meeting, meeting, and CRM/ tracking.
  2. Evaluate proposal process and materials to determine what is repeatable/ consistent and what is customized for each prospect.
  3. Score proposal for clarity, simplicity, value visibility, differentiation, and "wow factor".
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## *Service Model*

1. Define client segmentation and tiering by who you serve, what you deliver, and how it is provided.
2. Create full list of deliverables and determine which are differentiated across financial planning, tax planning, estate planning, tax optimization, portfolio management strategies, client communications, insurance, family resources, lending, etc.
3. Document process, workflows, materials, capacity constraints, client referral process, client feedback and testimonials.

# Day 1 - Discovery Cont.

## *Client Experience*

- 1. Document how you deliver clarity + context to achieve client confidence? (Services, materials, content/ messaging)**
  - 2. Determine if value and differentiation are consistently visible and reinforced.**
  - 3. Evaluate if clients can clearly communicate what you do, who you do it for, and during which life events you could best help a friend or family member? (Bonus points if you have this documented in materials)**
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## *Operational Infrastructure*

- 1. Determine the firm's Cybersecurity and Cyber Compliance confidence score. (Including potential AI usage)**
  - 2. Document process and technology efficiency for data management, portfolio management, compliance oversight, and reporting.**
  - 3. Define goals for cost, margins, new capabilities, adaptability, and data infrastructure.**
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## *Strategic Differentiation*

- 1. Document key differentiators across leadership, services, investments, niche clients, content, structure, and technology platform.**
- 2. Score effectiveness of communication across components of growth (Marketing, Prospect Journey, Service Model, Client Experience).**
- 3. Identify potential future enhancements to the differentiated value proposition.**

# Day 2 - Evaluation and Roadmap Delivery

## Documentation and Scoring

- Current technology and processes are defined and documented
- 3 key themes in each component are scored 1 -3
- Each component is scored 3 - 9
- Flywheel Alignment score between 18 - 54
- Enhancement opportunities ranked by ROI, cost, and complexity

## Strategic Roadmap

1. Strategy enhancement options
2. Process enhancement options
3. Existing technology usage enhancement options
4. Emerging technology solutions for consideration and due diligence

Strategic Roadmap identifies options that improve growth, the advisor experience, the client experience, margins, and operational capacity based on ROI, cost, and complexity.

## Activation

RIA determines prioritization and approach to improve the operating system and activate their custom growth flywheel. EVO is available to help with activation on a project or retainer basis.

# **Most firms don't have a flywheel. They have motion without momentum.**

**EVO has created the RIA Growth Flywheel framework for firms, teams, and advisors that are serious about durable growth.**

**EVO's structured approach has been designed from thousands of advisor consultations and hundreds of technology evaluations.**

**This engagement is best suited for established advisors and firms that are experiencing capacity constraints, desire higher growth, and higher margins.**

**If your firm is serious about driving growth through process and infrastructure, not episodic change, this is the starting point.**

**Schedule an introduction here:**

**<https://calendly.com/mike-evo/30min>**



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