

CFO/BD Services

What We Do

Assistance needed?

Yes	No	NA
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Chief Financial Officer (CFO)

Financial analysis/planning: gathering/analyzing financial data to optimize strategic decisions.

Profitability analysis/strategies: pricing, gross revenue, COGS, gross profit, operating profit, net profit.

Capital investment analysis/strategies: effectively allocating scarce resources to maximize profitability.

Risk Management: identifying, evaluating, and addressing business risk to protect solvency and profits.

Tax Management: making tax-wise business decisions that comply with tax law.

Business Development (BD)

Operational development

Multi-niche value proposition: service/product diversification that leverages current business capacities.

Business scaling: designing a scaling system that is sustainable and profitable at every level.

Operational systems design: superior systems design to achieve business scaling goals.

SOP development: policies, procedures, guidelines, workflows, checklists, templates, etc.

Progressive priority processing: identify top priorities and progressively improve processes to achieve them.

Priority project file system: creating/optimizing priority business systems, processes, procedures, tasks.

Document management: hierarchal filing systems, document archiving, etc.

Outsourcing: leveraging the expertise of others so that you can concentrate on what you do best.

Team development

Team member position development: designing position outlines that align with business needs.

Team triaging: applying the 80/20 Rule efficiently and effectively to each workstation.

Time management: Today's Top Five, ABC rankings, target dates, etc.

Task management: primary/secondary task assignments, delegating to competence, cross training, etc.

Team building: developing a dream team to attract/retain Tier I clients.

Team meetings: Today's Top Five list, targeted training, etc.

Team member scaling: global evaluation of team member development.

Team core competency evaluation: measuring the value contributed by each team member.

Miscellaneous

Business transition planning: optimizing the transfer of business leadership/ownership.

Multi-channel marketing development: internal/external, direct/network, mass.

Client relationship development: quality service, CRM software, etc.

HR management: employee benefits, onboarding, offboarding, etc.

IT management: leveraging technology to optimize business processes and profits.

Microsoft 365: team productivity, communication, collaboration; Teams site setup/management.

Other: _____

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