Dimensional

Practice Management Presentation Menu

Explore Dimensional's lineup of presentations and workshops designed to help you strategically manage and grow your business.

Practice Management: Presentations

To learn more about all that Dimensional's Practice Management team has to offer, visit our Collections page on MyDimensional.com or access our Menu of Services brochure.

Strategic Planning	Growth and Marketing	Human Capital	Investments and Operations	Client Experience
▪ Insights from the 2026 Global Advisor Study ▪ Beyond Succession: Data-Driven Ownership Transition ▪ Power of Purpose	▪ Building Blocks of Growth ▪ The Compounding Practice	▪ Health, Wealth, and the Impact on Your Client and Employee Experience ▪ Designed to Scale: Career Pathing and Organizational Structure ▪ Compensation by Design	▪ Articulating Your Value ▪ AI for Advisors: From Understanding to Action	▪ Why Client Experience is Your Competitive Edge ▪ Perception vs. Reality (Insurance) ▪ Preparing Your Business for the Great Wealth Transfer

Practice Management Overview presentation (30 min.) also available.

Presentation Descriptions

STRATEGIC PLANNING

Insights from the 2026 Global Advisor Study | 60 minutes

Explore findings from the 2026 Global Advisor Study. This presentation includes key takeaways and practical applications for business growth and success, including how to build a world-class advisory team that delivers an unforgettable client experience.

Beyond Succession: Data-Driven Ownership Transition | 60 minutes

Internal ownership transitions are among the most consequential decisions an advisory firm will make. Drawing on industry data and real-world examples, this session explores how leading firms are structuring equity transitions to develop future leaders, create sustainable ownership, and position their firms for long-term success.

Power of Purpose | 30 or 60 minutes

This presentation showcases the impact having well-defined mission, vision, and values statements can have on business operations, helping to steer your firm towards your long-term goals. Whether your firm is newer to the business or well established, learn how these foundational tools can truly benefit your business.

GROWTH AND MARKETING

Building Blocks of Growth | 60 minutes

With a baseline focus on identifying the ideal target client profile and refining the value proposition, this presentation leverages data from Dimensional's Global Investor and Global Advisor Studies to help firms understand how to attract new clients through referrals from existing clients. Explore how to create an exceptional client experience, build deeper trust, and turn clients into advocates.

The Compounding Practice | 60 minutes

Join Practice Management for a presentation on building your firm for growth. Topics include: What does it mean to pursue growth as a firm? How do I build a team for growth? Operations process that scale.

HUMAN CAPITAL

Health, Wealth, and the Impact on Your Client and Employee Experience | 60 minutes

Exploring data from Dimensional's Global Advisor and Global Investor Study, this presentation explores the relationship between health and wealth, and the impact it can have on your client and employee experience in terms of satisfaction and the growth and development of successful teams. This engagement will help you understand what clients truly value in their advisor relationship and explore ways to deliver an unforgettable client experience. Discover how High Performing Firms[1] shape their human capital strategy, driving employee retention, and what factors impact the employee experience.

Designed to Scale: Career Pathing and Organizational Structure | 60 minutes

The presentation focuses on maximizing a firm's most valuable resources: its people. It explores how headcount planning, role distribution, career pathing, organizational design, and recruiting can build the talent and structure needed to support sustainable growth.

Compensation by Design | 60 minutes

Compensation is one of the most powerful tools for attracting, motivating, and retaining top talent. Using industry benchmarking and best practices from High Performing Firms, this session explores how to design a comprehensive compensation philosophy and framework that promotes fairness, aligns incentives, and supports long-term business objectives.

INVESTMENTS AND OPERATIONS

Articulating Your Value | 60 minutes

This presentation combines research and data to help advisors learn how to articulate their value in fee conversations with clients. Using the Dimensional 4S Framework® as a guide, advisors will walk away from this presentation with the knowledge and skillset needed to have successful conversations around the value they provide to clients. The session will also provide advisors with a broader understanding of the fee landscape derived from insights gleaned from Dimensional's Global Advisor Study.

AI for Advisors: From Understanding to Action | 60 minutes

In this session, explore the intersection of artificial intelligence (AI) and the financial advisory landscape. Participants will receive a brief history of artificial intelligence and technological change, learn how generative AI can potentially transform the industry, and be challenged to think through the ethical and practical considerations surrounding the use of AI.

1. Dimensional's Practice Management group uses this term to identify the highest-performing advisory firms by evaluating metrics collected in the Global Advisor Study. Each firm is given a percentile rank across five metrics: revenue growth, client retention, employee retention, profit margin, and revenue per advisor. A firm's overall score is the average of these rankings. Firms whose overall score is in the top quartile among all firms are considered High Performing Firms (HPFs). Firms in the other three quartiles are referred to collectively as Other Firms.

CLIENT EXPERIENCE

Why Client Experience is Your Competitive Edge | 60 minutes

In today's competitive marketplace, client experience is more than just service delivery — it's the key driver of loyalty, referrals, and sustainable growth. Understand what clients truly value in their relationship and how those insights can reshape the way you grow your business. Powered by insights from Dimensional's Global Investor Study, discover where advisors often misjudge client priorities, learn proven strategies top firms use to elevate the client journey, and gain actionable tools to turn superior experiences into measurable growth. From the first interaction with a prospect to multigenerational wealth transfer, you'll walk away with a clear framework to differentiate your firm and win in today's client-centric environment.

Perception vs. Reality (Insurance) | 45 minutes

The perception around insurance and annuities has long been clouded with negativity, however this perception is no longer the reality. In this presentation, Dimensional explores the vital role insurance plays in a thriving advisor practice. Leveraging data from our Global Advisor and Global Investor Studies, this presentation highlights how top firms are embracing insurance to provide higher levels of client satisfaction and may help increase growth.

Preparing Your Business for the Great Wealth Transfer | 60 minutes

A massive wealth transfer is coming in the next 15 years, and advisors must adapt their business to win the next generation of clients. Learn how advisors can position their business for generational wealth migration and build strategies for retaining and growing assets. Using data from both the Global Advisor Study and Global Investor Study, this presentation discusses client experience initiatives for the next generation, identifies multiple approaches to client segmentation and tailored service offerings, and proposes key considerations for structuring your organization for long-term success.

Practice Management: Workshops

View the workshop description on the next page to learn more about workshop content.

Strategic Planning	Growth and Marketing	Human Capital	Investments and Operations	Client Experience
▪ The Next Chapter ▪ Future Firm	▪ Building a Foundation for Strategic Growth	▪ Structuring Your Team For Success: Career Pathing and Organizational Design ▪ Building Compensation Strategies That Drive Firm Goals Forward	▪ The Value Conversation	▪ Developing an Exceptional Client Experience

Workshop Descriptions

STRATEGIC PLANNING

The Next Chapter | Full-day and virtual 2-hour follow-up consultation

This workshop applies research, data, strategic planning, and hands-on activities to help owners create a codified plan for offering equity to employees and managing the shifting roles in an ownership transition.

Future Firm | 1.5 days

Future Firm is a highly curated, intensive workshop offered for highly aligned, growth-minded clients. This engagement requires extensive pre-work and is a collaborative, multi-day, off-site program.

GROWTH AND MARKETING

Building a Foundation for Strategic Growth | Half-day or Full-day

With a baseline focus on identifying the ideal target client profile and refining the value proposition, this workshop leverages data, planning, and exercises to help clients formulate their own plan for attracting new clients through referrals from existing clients and centers of influence (COIs).

HUMAN CAPITAL

Structuring Your Team For Success: Career Pathing and Organizational Design | Half-day or Full-day

This interactive workshop helps firms take a more intentional approach to managing their most valuable resource: their people. Participants will apply practical tools for headcount planning, role distribution, career pathing, organizational design, and recruiting to build a workforce the supports future growth.

Building Compensation Strategies That Drive Firm Goals Forward | Half-day or Full-day

Compensation is one of the most powerful tools for attracting, motivating, and retaining top talent. Using industry benchmarking and best practices from High Performing Firms, this workshop explores how to design a comprehensive compensation philosophy and framework that promotes fairness, aligns incentives, and supports long-term business objectives.

INVESTMENTS AND OPERATIONS

The Value Conversation | Half-day

This interactive workshop combines research, data, strategic planning, and practical exercises to help advisors articulate their value in fee conversations with clients. Using the Dimensional 4S Framework® as a guide, advisors will walk away from this workshop with the knowledge and skillset needed to have successful conversations around the value they provide to clients. The session will also provide advisors with a broader understanding of the fee landscape derived from insights gleaned from Dimensional's Global Advisor Study.

CLIENT EXPERIENCE

Delivering an Exceptional Client Experience | Half-day or Full-day

This interactive workshop provides firms an opportunity to reflect on their Global Investor Study responses and to collaborate on ways to improve the overall client experience. Firm's will walk away from the workshop having identified key areas of focus for their unique client experience initiatives as well as developing action items for implementation of the client experience enhancements.

Practice Management Regional Directors

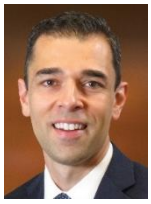
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