



# Driving Growth for a \$5B Advisory Team

For boutique financial advisory teams, achieving consistent growth requires more than technical expertise—it demands a deliberate, strategic approach to business development.

This \$5B AUM advisory firm partnered with Archway to transform their approach to messaging, client acquisition, and COI management. Archway's comprehensive process revealed untapped potential in their pipeline, strengthened relationships with key COIs, and empowered the team with the tools and confidence needed to scale. By aligning their efforts around high-value opportunities and refining how they engage with HNW clients and referral partners, **the firm unlocked \$68M in new opportunities.**

With tailored strategies and hands-on execution, Archway redefined what success looks like for a sophisticated advisory team, delivering a measurable and lasting impact on revenue growth.

## BUSINESS CHALLENGES

This team excelled at delivering exceptional service to high-net-worth clients, but faced persistent obstacles that stifled growth:

- **Unclear Messaging:** Their marketing lacked clarity, failed to differentiate their brand, and did not effectively define their ideal client profiles.
- **Unfocused COI Engagement:** Efforts were spread too broadly across many referral partners, without the depth needed to develop reciprocal, high-value relationships.
- **Inconsistent Pipeline Management:** A lack of structured processes and accountability left their pipeline underutilized and opportunities unrealized.

Without alignment and focus, the firm was unable to translate their technical expertise into scalable, revenue-driving strategies.



## OUR ARCHWAY APPROACH

### 01. Strategic Pipeline Activation

Archway helped the team generate \$68M in new opportunities, including a \$30M direct client referral. By implementing a structured pipeline strategy with consistent tracking and follow-ups, the team improved conversions and focused on KPIs designed to drive revenue growth.

### 02. Crafting a Compelling Narrative

Archway's Messaging Workshop clarified the firm's value proposition and ideal client profiles. A Messaging Matrix and hands-on coaching sessions equipped the team with storytelling skills and confidence to better connect with HNW clients and stand out in the market.

### 03. Strategic COI Nurturing

Archway shifted the team's focus from broad outreach to nurturing top COIs. Tailored engagement roadmaps, co-branded efforts, and value-driven referrals strengthened trust and led to a higher volume of quality referrals.

### 04. Building Sales Confidence

Archway helped the advisory team achieve growth by providing tailored one-on-one coaching, advanced sales strategies, and expert guidance on CRM utilization. This approach strengthened their business development capabilities and refined their overall sales effectiveness.





## OUTCOME

Archway's strategic guidance elevated the firm's business development approach, aligning their efforts with high-impact opportunities and fostering deeper, more strategic relationships. By instilling confidence, refining processes, and delivering actionable insights, the firm achieved significant revenue growth and established a scalable foundation for long-term success in the competitive HNW market.

## THE RESULTS



### Strategic Initiatives

Archway refined the team's sales strategies, focusing on high-impact activities supported by clear KPIs and data management.



### Revenue Growth

The team leveraged training to uncover \$68 million in opportunities and closed a \$30 million client.



### Clear Value to Market

The team achieved stronger alignment, expanded COI relationships, and leveraged a compelling value proposition that set them apart.



*"This engagement showcases Archway's ability to transform potential into measurable growth by refining strategy, strengthening relationships, and empowering the team to succeed."*

Abby Arcishewsky, President  
Archway Strategy & Consulting

## LEARN MORE

[www.archway.consulting](http://www.archway.consulting)  
[abby@archway.consulting](mailto:abby@archway.consulting)



**ARCHWAY**  
STRATEGY & CONSULTING