

Global Practice Management at Dimensional

With more than a decade of insights collected from Dimensional’s advisor community, our Practice Management team offers tools, expertise, and consulting to help you strategically manage and grow your business. To learn more, please contact your Dimensional representative or visit us at dimensional.com.

Tools and Resources

PODCAST

This series provides you with insights on best practices in key areas, including strategic growth, business efficiency, and the client experience.



PRACTICE POINTS

These briefs and videos explore key topics across a broad range of practice management categories to help improve your firm’s business strategy.



CONFERENCES, WEBCASTS, AND WORKSHOPS

Our events feature various subject matter experts and seasoned advisors who share the latest trends and best practices across the advisory landscape.



Leading Industry Studies

GLOBAL ADVISOR STUDY

Dimensional conducts one of the largest benchmarking studies in the industry, giving you strategic insight into multiple areas of your business.

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| 4,000 Firms | 15+ Countries Represented | 10+ Years of Data |
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GLOBAL INVESTOR STUDY

By directly surveying your clients, this annual survey can help you understand how your clients view your services and the overall advisory relationship.

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| 1,000+ Participating Firms | 100K+ End-Client Responses | 10 Years of Insights |
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Pillars of an Advisory Firm

Insights available to you and your team include:

| Strategic Planning | Human Capital | Investments and Operations | Growth and Marketing | Client Experience |
|--|---|---|--|---|
| <ul style="list-style-type: none"> Growing Your Business Firm Financials Key Performance Indicators Corporate Values and Mission M&A and Succession | <ul style="list-style-type: none"> Compensation Design Organizational Structure Employee Experience and Benefits | <ul style="list-style-type: none"> Business Continuity Plan Technology Selection Automating Workflows Asset Allocation and Model Portfolios | <ul style="list-style-type: none"> Marketing Trends Centers of Influence and Client Referrals Value Proposition Sales Tracking | <ul style="list-style-type: none"> Client Segmentation Improving Your Client Experience Understanding Your Clients |

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