



*YOUR GUIDE TO OUR*

# *Assessment Services*

*for Professional Service Firms*



SYNERGY PATHFINDERS, LLC ®



# *Discover the health of your firm*

Welcome to your path to greater clarity and success.

At Synergy Pathfinders, LLC, we understand the unique challenges that professional service organizations (PSOs) face in delivering excellent client outcomes while managing internal efficiency and partner alignment. Whether you're a law firm, accounting practice, consulting agency, or another client-facing organization, a strong operational foundation is key to sustainable growth.

Our assessment service is designed to give you a clear picture of your firm's current operations, uncover opportunities for improvement, and help you take confident steps toward your desired future state.

Through a structured discovery and assessment approach, our team works closely with your professionals, analyzing workflows, utilization, service delivery, and infrastructure. The result: a detailed, actionable roadmap tailored to your firm's specific goals and challenges.

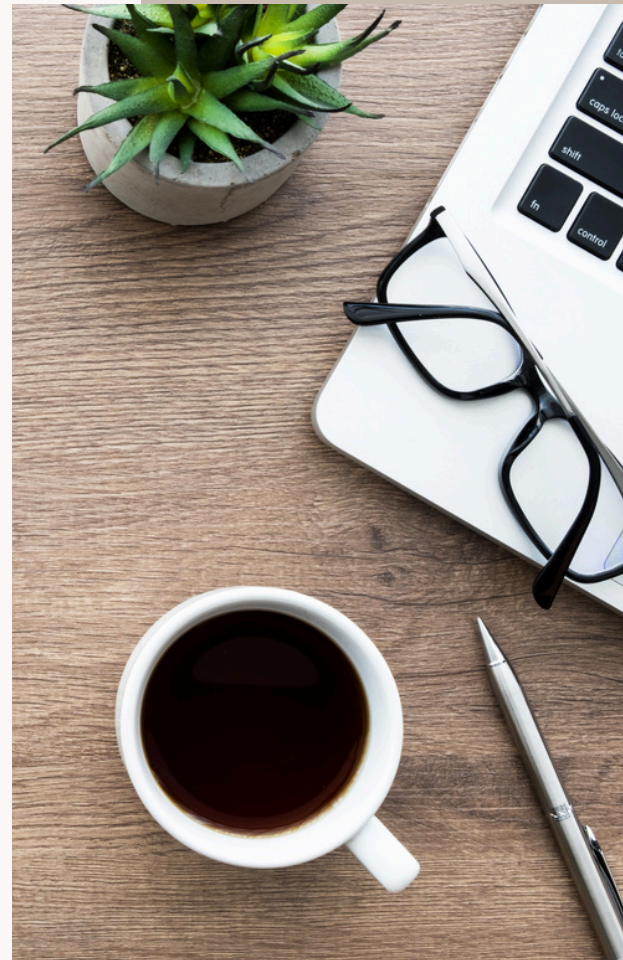
# *What is an assessment?*

Gain clarity. Make confident decisions. Build a better organization.

An assessment is a structured evaluation process that helps your organization understand its current state, operational capacity, and opportunities for improvement. We dive into key areas of your company, such as:

- Client service delivery workflows
- Organizational management and administrative systems
- Staff and partner utilization
- Onboarding and engagement processes
- Internal communication and collaboration

Whether your organization is experiencing rapid growth, preparing for succession, adjusting to remote or hybrid work, or seeking improved profitability, our assessment provides the data and insights you need to move forward with confidence.



# *Our Three-Phase Assessment Approach*

Every engagement follows a proven methodology: Discovery, Assessment, and Report. Each phase's length depends on the availability of information and documentation, leadership and staff participation, and the scope of the assessment.

## **Discovery**

We conduct structured interviews with owners and/ or other executive-level stakeholders, managers, and key staff to learn how your organization operates. We also gather documentation and review client-facing and internal workflows.

## **Assessment**

Using the insights gathered, we evaluate your firm's current state and perform a gap analysis to identify the areas that are misaligned with your strategic goals. Our focus may include underutilization, workflow efficiencies, or customer delivery inconsistencies.

## **Report**

We deliver a comprehensive, easy-to-understand report that includes key observations and insights, specific opportunities for improvement, and operational recommendations.



*“A goal without a timeline is just a dream. Small businesses thrive when operational plans match ambition.”*  
— Robert Herjavec





## *Deliverables: Tailored solutions*

### ***After the Assessment: Next Steps...***

Each assessment engagement includes:

- **Comprehensive Written Report:** A detailed summary of findings, highlighting strengths, weaknesses, and actionable recommendations
- **Executive- Level Presentation:** A session with your leadership team to review results, answer questions, and provide clarity on next steps.

You have two clear options following your assessment:

- **Partner with Us for Implementation:** We support your firm through the execution of recommended changes. We can help with change management, system implementations, staff training, workflow design, and more.
- **Use the Report Internally:** Use our report to empower your internal team to drive change using the tailored recommendations we provide.

# About Us

Synergy Pathfinders, LLC (SP) was established with the mission of addressing the unique challenges small business owners encounter when seeking to grow or striving to implement best practices within their operations.

Our founder, Heather Garland, brings over 25 years of extensive experience, including more than a decade spent in public accounting. Prior to launching SP, Heather served as the inaugural Chief Operating Officer at Alaska's largest locally-owned certified public accounting firm. Her proven track record includes successfully guiding organizations through crucial improvements in both accounting and operational efficiency. "My passion is working with companies to find solutions for their obstacles - including the ones they don't know they have," says Heather.



Heather



Ready for a free consultation?  
Scan the QR Code or visit our  
website to schedule a  
consultation!



**SYNERGY PATHFINDERS, LLC ®**

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