



*YOUR GUIDE TO OUR*

*Fractional*

*Chief Operating Officer*

*Services*

*for Professional Service Firms*



SYNERGY PATHFINDERS, LLC ®



# *Optimize operations. Elevate client delivery.*

You understand the importance of delivering exceptional client experiences while maintaining operational excellence. Yet, the pace of growth, industry complexity, and evolving client expectations can strain internal systems and leadership bandwidth. Hiring a full-time Chief Operating Officer (COO) may not always be the right fit—especially during periods of transition or scale.

That's where Fractional COO services come in. Our Fractional COO offering provides seasoned operational leadership tailored to the unique needs of professional services organizations. Whether you're navigating rapid expansion, restructuring, or refining internal systems, our expertise supports your firm without the overhead of a full-time executive.

We bring clarity, accountability, and operational discipline—so your team can focus on delivering high-value services. From strategic planning to process improvement, talent development, and risk mitigation, we serve as a trusted partner helping you build a scalable and sustainable firm.

# *What is a fractional COO?*

Gain clear insights into your nonprofit's health, empowering confident decisions that advance your mission and increase your impact.

A Fractional COO provides the strategic leadership and operational expertise your professional services firm needs to scale efficiently without the cost of a full-time executive. By bringing in a seasoned operator on a part-time or project basis, your firm gains access to high-level support in areas like process improvement, team structure, service delivery, and performance management. This allows firm owners and partners to stay focused on client work and business development while the Fractional COO ensures day-to-day operations are streamlined, goals are met, and the organization is positioned for sustainable growth.



# Strategic Planning

## Build a Clear Path Forward. Align Vision with Execution..

Success stems not just from delivering excellent client work, but from running a business that is strategically aligned, future-focused, and operationally sound. Whether you're positioning your firm for growth or preparing for leadership transition, clear strategy is critical. Our services help firm leaders define priorities, align internal teams, and implement action plans that drive sustainable progress. We take a collaborative, insight-driven approach to ensure your operations are set up to support long-term goals.

### **Services include:**

- Visioning and goal alignment
- Strategic roadmap development
- Succession planning & leadership transitions
- Execution support & accountability frameworks

### **Deliverables can include:**

- Comprehensive strategic plan
- 3-5 year growth & capacity roadmap
- Leadership succession strategy
- Action plan workbook
- Quarterly progress reports



*“Remember, today  
is the tomorrow  
you worried about  
yesterday.”  
– Dale Carnegie*

# Operational Optimization

Run leaner, smarter, and more efficiently.

Your people and processes are the product. Workflow issues, poor planning, and clunky systems can hurt margins, delay work, and exhaust your team. That's where we come in. Our services streamline how your firm runs—boosting efficiency, clarity, and profitability. We dig into your operations to find gaps, cut redundancies, and improve flow across project delivery, communication, and resourcing. Hands-on and data-driven, our approach builds systems that scale with your growth.

## **Services include:**

- Operations audit
- Workflow and process improvement
- Resource planning
- Dashboard and performance tracking
- Change implementation support

## **Deliverables can include:**

- Process maps and SOPs
- Capacity planning tools
- Technology recommendations
- Operations improvement roadmap



*“Streamlining is not about cutting corners. It’s about clearing the path.”*  
– Unknown

# *Policies and Procedures*

## **Create structure and clarity that scales.**

For professional services firms, clear policies and procedures ensure consistency, compliance, and accountability. Without them, teams rely on assumptions—leading to mistakes and inefficiencies.

We help you document and improve core processes, from onboarding and billing to compliance. Our structured approach brings clarity, alignment, and better service at every level.

### **Services include:**

- Interviews and process documentation
- Policy and compliance review
- Custom SOP development
- Training and implementation support

### **Deliverables can include:**

- Operational policy manual
- Templates and checklists
- Standard operating procedures



*“If you don’t have a process, you don’t have a business—you have a mess.”*  
— Michael Gerber

# *Risk Assessment*

**Protect what you've built.**

Running a professional services firm comes with complex risks—from data security to compliance and operational gaps. Many firms don't recognize their vulnerabilities until it's too late. Our services help you identify and manage these risks proactively, using a holistic approach that covers people, processes, technology, and client relationships. We provide a clear view of your risk profile and a practical plan to strengthen long-term resilience.

## **Services include:**

- Operational risk review
- Internal control assessment
- Business continuity & contingency planning

## **Deliverables can include:**

- Customized risk assessment report
- Risk heat map & prioritization guide
- Gap analysis & recommended controls
- Mitigation action plan
- Business continuity & recovery framework



*“Risk comes from not knowing what you’re doing.”*  
— *Warren Buffett*

# Change Management

Lead your team through transitions- without the chaos.

Change is constant in a growing firm, but unmanaged change can disrupt workflows and morale. We help professional services firms navigate transitions with clarity and care—ensuring leaders are prepared and staff stay engaged. From planning to implementation, we support every step of the change process to drive smooth, successful outcomes. With the right approach, change becomes a catalyst for growth, not a barrier. Our goal is to turn uncertainty into opportunity and keep your firm moving forward with confidence.

## **Services include:**

- Change readiness assessments
- Stakeholder alignment & engagement
- Communication planning & messaging
- Training program design
- Post-implementation support

## **Deliverables can include:**

- Change readiness & risk report
- Communication toolkit
- Adoption & resistance management plan
- Success metrics dashboard



*“People don’t resist change. They resist being changed.”*  
– Peter Senge

# *Artificial Intelligence Initiatives*

**Use AI to gain an edge- even if you're not tech-savvy.**

Artificial Intelligence is transforming how professional services firms operate from automating routine tasks to uncovering insights that inform better decision-making. Whether you're exploring automation for time tracking, leveraging predictive analytics for client insights, or enhancing internal workflows with intelligent tools, we help you understand where AI fits and how to implement it effectively. Our goal is to help your firm improve efficiency, strengthen client service, and stay ahead of industry trends.



## **Services include:**

- AI readiness assessment
- Customized AI strategy development
- Tool and vendor selection
- Implementation and integration support
- Change management

## **Deliverables can include:**

- AI opportunity report
- Custom AI strategy & roadmap
- Tool/ vendor comparison report
- Implementation checklist
- Ongoing support

*“AI is not just a technology, it’s a new way of seeing the world.”*  
– Fei-Fei Li



# *Tailored solutions*

We step in as a partner and guide, becoming a seamless extension of your team.

- Initial consultation
- Define organizational goals
- Scope and service agreement
- Onboarding and orientation
- Action planning
- Implementation
- Continuous feedback and adaptation

## ***Is now the time for a Fractional COO?***

- *You're preparing for or navigating organizational growth*
- *You need operational leadership but not a full-time COO*
- *Your team is stretched thin or burning out*
- *You're preparing for an executive or board transition*
- *Strategic priorities are clear, but implementation is stuck*

# 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!



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