

Empower Your Way Forward: Driving Growth & Efficiency

Program Overview

Sitting on the sidelines and not taking any action are two ways of dealing with an economic recession. They're just not the best ways and can be detrimental to your business. Research indicates that successful firms who drive both growth and trim costs by enhancing operational efficiency are more likely to not just weather a sharp economic pullback, but emerge stronger and more profitable when the economy recovers.

Welcome to *Empower Your Way Forward*, a series of videos and strategic exercises to help your firm respond to this challenging business environment and sudden economic shock triggered by a global pandemic.

We designed the program to help leaders think about what's changed in 2020 when it comes to their clients, business capabilities, and team as well as how firms operate day-to-day. The most resilient leaders are asking themselves what changes are permanent, which ones are beneficial, and what needs to evolve regarding the firm's operating model. Some are assessing if the vision for the business has shifted. Our mission is to help leaders reflect on the last 12 months and BNY Mellon|Pershing will help you update a business plan or create a new plan in order to move forward, all based on what you have learned and see as opportunities ahead.

HOW TO USE THE PROGRAM

Start by watching the brief introductory video which highlights what successful firms—both financial and nonfinancial—did during recessions to return to strong growth. The video also details the pitfalls of failing to act.

Next, your Relationship Manager will guide you through an exercise to reflect on your business over the past year and prioritize areas of your business that you want to focus on in the next 12 months. You may also want to review a few of the additional consulting topics, which dive deeper into:



MARKETING



DRIVING
GROWTH



CLIENT
EXPERIENCE



HUMAN
CAPITAL



TECHNOLOGY



EFFICIENCY



FINANCIALS

Additional video clips and brief background materials are included to provide refreshers and pointers, on topics such as achieving greater efficiency and optimizing usage of NetX360. Leverage these additional resources, as needed; they are designed to provide background information and ideas to consider incorporating into your growth and efficiency goals.

Upon completion, you should have several action areas that have been identified for further analysis or specific actions items. Your Relationship Manager will help you utilize the business plan template to help refine your business plan or build a plan to address these focus areas.

Please reach out to your Relationship Manager for guidance to lead you through the program and serve as a sounding board while you reflect on this year and the year ahead. We also have Business, Technology and Practice Management Consultants who can support this process, help you address needs, and work with you to move your business forward.

©2021 Pershing LLC. All rights reserved. Pershing LLC, member FINRA, NYSE, SIPC, is a subsidiary of The Bank of New York Mellon Corporation (BNY Mellon). Pershing Advisor Solutions LLC, member FINRA, SIPC, and BNY Mellon, N.A., member FDIC, are affiliates of Pershing LLC. Advisor Solutions refers to the brokerage services business of Pershing Advisor Solutions and the bank custody solutions business of BNY Mellon, N.A. Pershing LLC, Pershing Advisor Solutions LLC and BNY Mellon, N.A. Bank Custody Solutions do not provide investment advice. Affiliated investment advisory services, if offered, are provided by Lockwood Advisors, Inc. (Lockwood), a Pershing affiliate and an investment adviser registered in the United States under the Investment Advisers Act of 1940. Certain services may also be provided by Albridge Solutions, Inc., a Pershing affiliate.

For professional use only. Not intended for use by the general public. Trademark(s) belong to their respective owners. This material is for general information purposes only and is not intended to provide legal, tax, accounting, investment, financial or other professional advice on any matter. Pershing is not responsible for updating any information contained within this material and information contained herein is subject to change without notice.

[pershing.com](https://www.pershing.com)

One Pershing Plaza, Jersey City, NJ 07399

PER_PAS_287_3854_BRO_Empower Your Way Forward Program Overview_0321