Your Advisory Firms Have Grown. Help Their Operations Keep Up.

Capacity Reset | Atlas Park Operating Systems™

A focused three-month engagement for growing independent wealth management firms whose operating structure has not kept pace with their business.

Give your advisor firms a defined path to address **owner dependence**, **inconsistent workflows**, and **strained team capacity** - with consulting, implementation, and adoption support.

People + Ownership

Clarify responsibilities, decisions, and handoffs.

Process + Technology

Align agreed workflows with the firm's CRM.

Redtail, Wealthbox, Advyzon or Salesforce.

Accountability

Train the team and reinforce adoption.

What participating firms receive

Operating-model diagnosis; role and ownership clarification; agreed onboarding and client service workflow development; supporting CRM implementation; team training and adoption reinforcement; and leadership recommendations.

A consistent framework. Firm-specific implementation.

Atlas Park connects people, processes, technology, and accountability. Priorities, deliverables, responsibilities, and milestones are confirmed before kickoff. Broader operational leadership may require Fractional COO support.

The CRM is where the system lives.
It is not the system itself.

A Clear Resource for Firms Feeling the Strain.

Extend your advisor support with focused implementation.

Which firms should you introduce?

Growing independent advisory firms where the owner remains the hub for routine work, onboarding relies on memory, new hires lack clear responsibilities, or the CRM is underused. A specific operational trigger and leadership readiness matter.

What the firm needs to bring

A leadership sponsor, a designated internal point person, timely system access, and team participation. Leadership must reinforce the agreed changes and assign ownership for maintaining them.

Two ways to explore a partnership

Referral relationship

Introduce suitable firms. Atlas Park assesses fit directly with leadership and confirms scope, investment, and delivery availability.

Sponsored participation

Explore funding or contributing toward selected engagements. Agree on eligibility, contracting, communication, and permitted reporting before launch.

How the engagement moves forward

1. **Diagnose:** identify constraints and agree on implementation priorities.
2. **Implement:** clarify ownership, build selected workflows, and configure supporting CRM components.
3. **Activate:** train the team, reinforce adoption, and confirm maintenance ownership.

Start with a suitable firm. Evaluate the relationship before discussing broader access.

Clear Answers.
A Practical Next Step.

Frequently Asked Questions (FAQs)

Is Capacity Reset a software or a template library?

It is a consulting and implementation engagement. Atlas Park works with leadership and the team to build and activate the agreed operating structure.

Does each firm receive the same implementation?

Each engagement uses the **Atlas Park Operating Systems framework**. The agreed work reflects the firm's team, service model, technology, and priorities.

How are progress and partner reporting handled?

Relevant measures are agreed based on scope and available baseline information. Any partner reporting requires advance agreement with the participating firm about what may be shared and with whom.

What does participation cost?

Investment is confirmed based on firm size and agreed scope. Sponsorship and contracting terms are discussed separately. Participation is subject to fit and delivery availability.

How does this differ from Fractional COO support?

Capacity Reset addresses defined priorities over three months. Fractional COO support provides broader operational leadership, accountability, and ongoing execution support.

Led by Cameo Roberson, Founder & CEO

Atlas Park brings more than 20 years of financial services operations and leadership experience to independent wealth management firms. Our team of 7 RIA experts supports the advisory engagement. Our clients work with **LPL Financial**, **SEI**, **Fidelity**, and **Charles Schwab**.

Discuss Capacity Reset for the firms you support.

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