

PLANNERS' TED TALKS

You're Not Short on Capacity, You're Choked by Constraints



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You're Not Short on Capacity, You're Choked by Constraints

The real reason your firm feels full

Presented by: **Chris Hindle, Co-founder & Director of Operations**



The Lie We Tell Ourselves

"We're busy, so we must be growing"



Busy \neq Productive



Full \neq Throughput



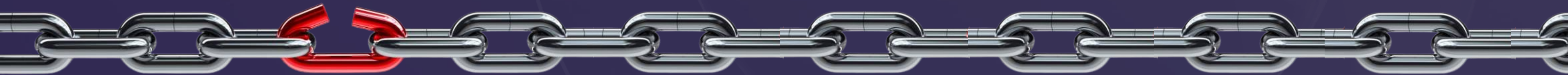
More \neq Output



The system moves at the speed of its slowest step

- The strength of the chain = weakest link
- One bottleneck controls everything

The Core Idea (The Goal)





What This Looks Like in Advice Firms

Your constraint is hiding in plain sight



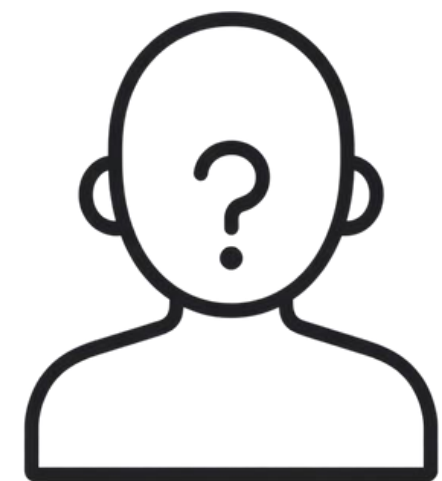
Paraplanning Backlog



LOAs & Provider Delays



Adviser Sign-off



Client prep / data gaps

The Mistake Most Firms Make



More Hires



Better CRM



Faster Reports



More Effort

None of this fixes flow

What Actually Works (Real Example)

We changed the flow — not the workload

1. Small batches, faster flow

2-Week Cadence ●

Momentum > Waiting ●



What Actually Works (Real Example)

We changed the flow — not the workload

2. Separate planning from strategy

Planning = thinking ●

Strategy = execution ●



What Actually Works (Real Example)

Same-day handling at bottlenecks

3. Remove queue time at the constraint

Bottlenecks never wait

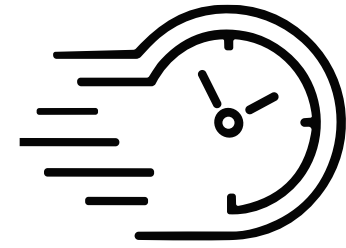


Waiting is where 90% of time is lost = execution



The Result

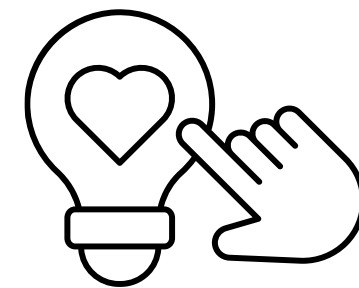
Capacity appeared — without hiring



Faster onboarding



More cases completed



Less stress



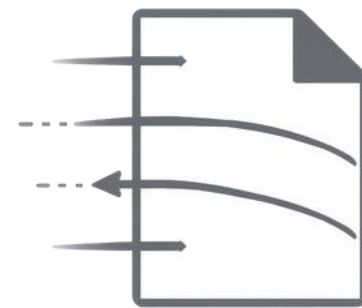
Higher revenue

The Shift

Stop managing effort.
Start managing constraints.



AI and capacity



Drafting → Faster

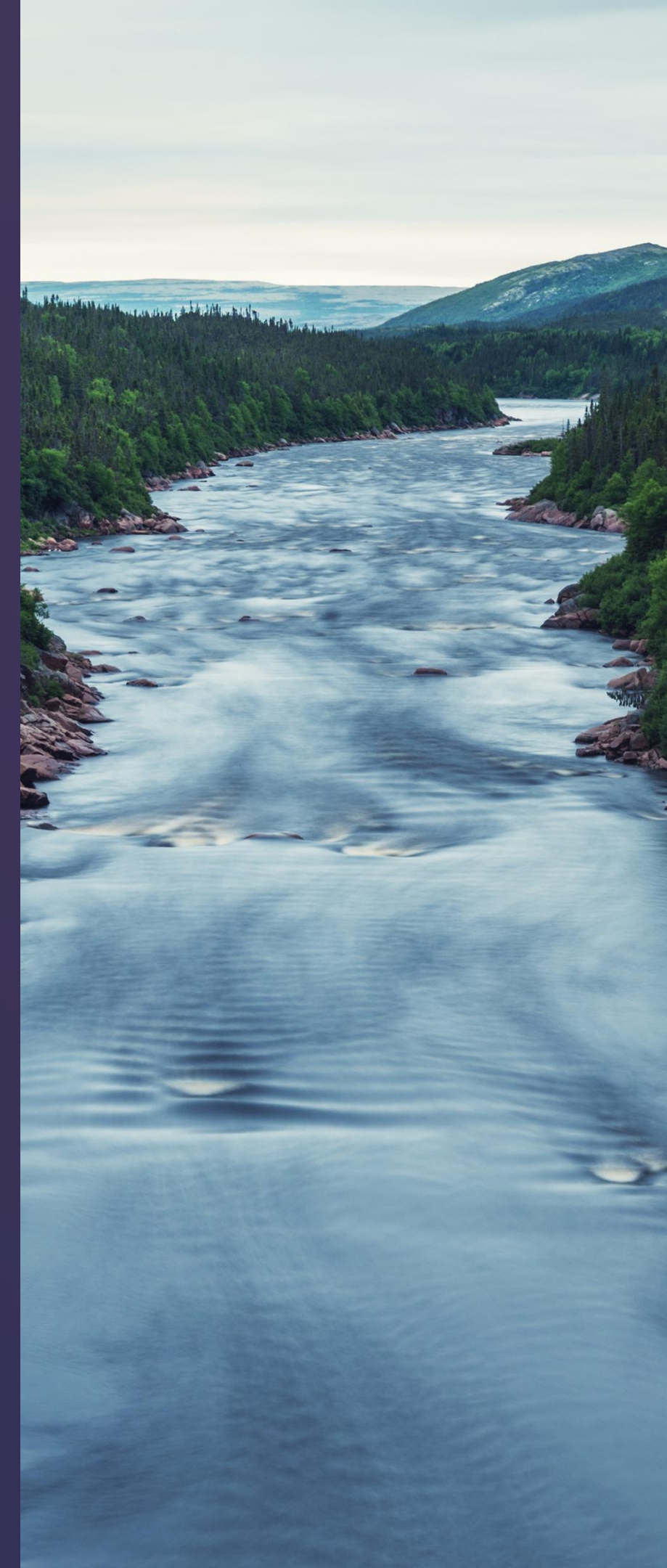


Admin → Reduced



Judgement → Still Human

AI doesn't create capacity — it accelerates flow



Thank You

Stop Managing Effort.
Start Managing Constraints.



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Questions? Let's connect.