

Strategic Growth. Grounded In Reality.

Our Expertise.
Your Success.

Precision
Practices



Has Your Strategy Kept Up With Your Growth?

Most successful businesses don't need a complete overhaul, they need a **strategic reframe**. At Precision Practices, we help ambitious leaders **evolve without the chaos**, refining the systems and strategies that built your success so they drive your next phase of growth.

We're seasoned partners, not traditional consultants. We guide **ambitious leaders**, like you, through critical transitions, while preserving what made them successful, delivering **renewed momentum** and **sustainable growth** without compromising your competitive edge.



**40+ Years
Experience**



**Strategy &
Operations**



**Marketing &
Advertising**



**We Scale
With you**

Some of Our Offerings

Strategic Repositioning & Growth Planning

Help founders and firm leaders refresh their vision, rebuild foundations, and re-energize their teams.

Messaging, Brand & Market Presence

Modernize brand identity and narrative to reflect who the firm is today. And where it's going tomorrow.

Operational Support & Implementation

"Do as I say" often doesn't help. We don't just tell. We do. Whatever it takes to get your firm closer to its goals. That's our mission.

Customer Experience & Retention

Examine your customer journey from start to finish and ensure your service provision surprises and delights along the way.

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About Me

I've spent my career helping professional services firms grow with clarity, confidence, and momentum. From leading global strategy at PwC to advising founders and boutique firms, I bring both boardroom perspective and hands-on execution. My passion is partnering with leaders to evolve what's working, fix what's not, and build systems that scale without chaos.

Clients who work with me often stay for years - because growth isn't just about results, it's about trust.

What I Bring to the Table

- **Strategic Clarity:** Helping firms reframe their vision and align teams for sustainable growth.
- **Execution Expertise:** Turning complex sales + marketing systems into demand engines that work and generate new business.
- **Messaging that Converts:** Translating expertise into simple, human stories that attract the right clients.
- **Change Without Chaos:** Guiding transitions – mergers, rebrands, new markets – with intention and steadiness.

Career Highlights

- **PwC Partner** - Built global knowledge and online strategy practices, leading teams of 400+ worldwide.
- **Growth Architect** - Doubled revenue and reduced churn by aligning sales + marketing post-merger.
- **Legal Sector Wins** - Drove law firm SEO strategies to #1 rankings and oversubscribed pipelines.
- **Turnaround Expert** - Sold out a 400-unit condo development in 30 days by overhauling marketing strategy.

A Few Things About Me

- 30+ years advising leaders across law firms, finance, consulting, healthcare, and technology.
- Trusted by clients for years, many still make me their first phone call when they hit a wall.
- Former 4-sport athlete and lifelong swimmer - good strategy like sport, requires endurance, rhythm, and teamwork.
- Find me outdoors: hiking, paddleboarding, or preparing for my next adventure

Why Work With Me

Because the right strategy doesn't just grow your firm - it gives you back control, confidence, and time. My role is to help you see the next move clearly and make it with Precision.

Doubling Conversions Without Doubling Workload

Industry: Professional Services (Mid-Sized Law Firm) Region: Northeast U.S.

The Challenge

A growing law firm with 5+ attorneys was attracting strong inbound interest through paid ads but converting fewer than 15% of qualified leads. The internal team described the issue as too many calls not enough time leading to inconsistent follow-up and missed opportunities.

Our Approach

- Ran a rapid sales pipeline audit to identify friction points.
- Mapped the full lead journey - from first touch to signed retention letter.
- Simplified intake and follow-up sequences into one streamlined semi-automated process
- Trained the team on the new process, embedding performance metrics to support accountability.

THE OUTCOME



↑ **31%**

Conversion rate in 90 days



**under
6 hours**

Time-to-first-contact



-28%

Cost per signed client

Relevant Insight - Firms that respond to leads within one hour are up to 7x more likely to qualify them (Lead Connect, 2024).

Why It Matters

If your firm is generating leads but struggling to close them, the fastest growth often comes from optimizing what's already working—before spending more on marketing. This is the kind of clarity that drives scale.



Genie Lutz

Founding Partner
Former PwC Partner
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Ross Yellin

Founding Partner
Lawyer, Former CEO
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Messaging Refresh Drives Industry Authority

Industry: Financial Services (Wealth Advisory) Location: Pacific Northwest

The Challenge

An independent wealth advisory firm had grown steadily for a decade but felt “stuck.” Their messaging no longer reflected the scale, expertise, or unique client experience they provided, and competitors with fresher branding were winning higher-value accounts.

Our Approach

- Conducted competitor messaging audit, identifying where others were overpromising or creating confusion.
- Interviewed top clients to uncover the language that resonated most.
- Rebuilt the firm’s value proposition, website copy, and pitch decks.
- Created a quarterly thought-leadership content plan aligned with LinkedIn algorithm best practices

THE OUTCOME

 **↑45%**

Website engagement up 45% within 60 days of relaunch.

 **3**

Generated 3 inbound inquiries per week from \$2M+ portfolio prospects (vs. 1 per month before.)



↑22%

Improved close rate on new client opportunities by 22%.

Relevant Insight - Clients emotionally connected to a brand have a 306% higher lifetime value (Motista, 2023).

Why It Matters

Your messaging is either winning business or handing it to your competition. If it’s been more than 3 years since a refresh, you’re likely speaking to yesterday’s market.



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Scaling Without Sacrificing Client Experience

Industry: Founder-Led Business - Health & Wellness Location: Multiple California

The Challenge

The founder had expanded to 5 locations but was overwhelmed by day-to-day operations. Staff turnover was climbing, client experience scores were inconsistent, and growth had stalled.

Our Approach

- Implemented a repeatable operations playbook for client intake, service delivery, and follow-up.
- Introduced performance dashboards tied to client satisfaction metrics.
- Rolled out staff training on service consistency and upselling techniques.

THE OUTCOME



+25%

Improvement in client retention in the first year.

40

40%

Increase in upsell revenue from existing clients.



-35%

Founder's operational involvement dropped from 70% of their time to 35%, freeing capacity for more growth.

Relevant Insight - Companies that deliver a consistent customer experience across locations see revenues increase by 10-15% (McKinsey, 2023).



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Why It Matters

Scaling is not about doing more - it's about making what works repeatable so your clients get the best version of your business every time.



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WHY PRECISION PRACTICES

- ✓ 40+ years of experience building and fixing
- ✓ Strategic + operational brains in one trusted team
- ✓ Deep respect for legacy, paired with a bias toward action
- ✓ We scale with you - not ahead of you

SOME OF OUR OFFERINGS - BESPOKE TO YOUR NEEDS

- ✓ **Strategic Repositioning & Growth Planning**
Refresh your vision. Rebuild your foundation. Re-energize your team.
- ✓ **Revenue Alignment & Operations Optimization**
Build systems that support growth without sacrificing sanity or soul.
- ✓ **Messaging, Brand & Market Presence**
Clear, differentiated messaging that reflects who you are now, not who you were five years ago.
- ✓ **Fast Diagnostics & Competitive Audits**
Insights you can act on, not just admire.
- ✓ **Change Without Chaos**
When it's time to evolve, we help you do it with intention, not overwhelm.



READY FOR WHAT'S NEXT?

Let's reimagine your growth-
without losing what makes
you great.

Schedule a
discovery session.



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