



Jen Goldman - Vistage Speaker



### **Transforming Your Business Operations for Growth, Legacy, and Profitability**

**Description:** Scaling your business operations can be overwhelming, and knowing what to improve first is difficult. In this highly interactive program Jen will open your eyes to improvements you can make to avoid costly missteps. You will learn 3 Mind Shifting Techniques that have helped thousands of businesses expand their impact and navigate through growth to thrive. You will explore and work on four exercises: Role Charting, IDEOS™, 4W Business Planning™, and Tech Flow Map™ to develop an action plan that quickly prioritizes high-impact initiatives and optimizes your people and systems to transform your business.

1. MVCOO's Role Responsibility chart™ to identify capacity, skill and passion gaps as well as potential owner burnout indicators. We collaboratively identify potential solutions that range from elimination of work due to integrations/automation, intern training program, job description project with staff to the use of outsourced service providers, careers website page, and recalibration of staff into better-suited roles that empower the staff and allow them to “rise”.
2. Poster white board a “clunky” process and apply MVCOO's IDEOS™ thinking to identify missed opportunities to lower the workload. Processes can range from lead, prospect, new client onboarding, to client servicing and back-office operations.
  - Integrate: integrate software to reduce the work
  - Delegate: delegate the work to empower
  - Eliminate: eliminate unnecessary work or automate
  - Outsource: integrate providers
  - Staff: recalibrate staff to match skills, passion, capacity



**Benefit of IDEOS™:** Eliminate work, Embrace Clarity, Energize Growth, Ease the Learning Curve, and Engage Staff.

3. Co-build a list of business aspirations, ideate improvement ideas, and then apply 4W Business Planning™ methodology to build a high-impact improvement plan.
4. Tech Flow Map™ that identifies items you can automate or eliminate

**Value to member:**

Members will leave with acceleration tools and specific ideas that can be brought back to their teams to implement and boost the pace of improvements, profitability and productivity, and growth.

**Speaker Bio:**

Jen Goldman brings 30 years of experience as a Business Transformist for Small Businesses. She has transformed hundreds and trained thousands of service businesses on how to scale up teams, profits, and clients through operational, skill, and mindset improvements. Jen's expertise includes strategic business planning, staff and provider recalibration, change acceleration, tech integration optimization, Lean® process creation, and implementation and high adoption of operational efficiencies. Her philosophy includes Visualization, Productive Collaboration, 4W and 3Ps and a G Benefit Documentation, and IDEOS™.

**Testimonial from Craig James, Vistage Chair:**

"Her program kept my members engaged with various hands-on exercises, a couple of which involved them getting up out of their seats. Her scores averaged 5.0 for content, 4.6 for delivery, and 5.0 for applicability, with 100% recommendation - which is no small feat given that we have a couple of members with reputations for grading harshly.

Jen has an engaging style, which helped her instantly connect with my members. She was mindful and respectful of time, planning her wrap-up so that she finished right on time. Also, she never drifted into selling mode. If you have a meeting without a speaker or if a speaker cancels, I strongly recommend inviting Jen to present to your group. You—and your members—won't be disappointed."



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