

## About Us

We bring 30 years of experience transforming more than 300 and training more than 1,000 service businesses to thrive. We increase the health of businesses of your business so you can serve more consumers, provide purpose and career paths to your employees, and increase your value and impact upon your community.



## 1-Year Impact Stories

- ▶ 15% Net Profit Increase
- ▶ 20% Valuation Increase
- ▶ 70% of Clients and 10% of Revenue Shed
- ▶ Owner 'No Sale' to '100% Sale' in 5 months
- ▶ 28% -> 59% EBOC & \$20mil new AUM
- ▶ 21% increase in new revenue
- ▶ Team Capacity 50% increase
- ▶ 27% Net Profit Increase
- ▶ 4x Advisor Team Capacity



**Founder Jen Goldman**

## How We Do It

- 01 Growth and Impact Projection**  
Calculates new clients, staff and ops expenses based on growth goals
- 02 Visual Plan of Improvements**  
Sequence of recommendations and benefits. Accelerates decisions and adoption
- 03 Life Org Design™**  
Accelerates hiring staff, providers, exit planning
- 04 Responsibilities and Skills Chart**  
Accelerates delegation and exit mindset
- 05 CX OX™ Chart**  
Accelerates decision to shed not-fit clients and eliminate unprofitable servicing
- 06 IDEOS™ and Lean® Processes**  
Accelerates improvements. Eliminates work. Increases productivity and DIY training.
- 07 Tech & Automation Map**  
Eliminates shiny objects. Increases capacity. Identifies automation opportunities.

# Our IDEOS™ Improvement Mantra



## Integrate

Identify, educate and implement tech integrations to reduce the work



## Delegate

Create processes to power delegate the work and monitor operations



## Eliminate

Eliminate unnecessary work through automation and process improvements



## Outsource

Identify and integrate outsources to further streamline your operations



## Staff

Recalibrate staff into roles and career paths best suited to skills and passions



## Get In Touch

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# SPEED TO SUCCESS AND MARKET

