

**665+ Business Clients**

**30+ Years Experience**

**Solving the needs of businesses that...**

Sought time and clarity on scaling while providing increased value, more rewards, and improved culture.

Wanted less work, increased profits, optimized time-energy-talent, and avoidance of costly missteps.

Needed skilled, energized team members and buy-in to improvements with no fear of change.

**We meet our clients where they are and bring energy and expertise to help them thrive faster, better, forever.**



**Founder Jen Goldman**



## 1-Year Impact Stories

- 15% Net Profit Increase
- 20% Valuation Increase
- 70% of Clients and 10% of Revenue Shed
- Owner flipped from not selling to 100% sale in 5 months
- 28% -> 59% EBOC and \$200k new revenue
- 21% increase in new revenue
- 50% increase in team's capacity
- 27% Net Profit Increase
- 4x Advisor Team Capacity

**Our Purpose is to accelerate scaling and improve business health and flow so our clients and their employees, clients, and community experience greater rewards.**

## Our Transformative Techniques and Deliverables

- 01 Growth and Impact Projection**  
Decide how big you want to grow by seeing revenue, expense, staff, and profit projections.
- 02 Visual Plan of Ops Improvements**  
Documented sequence of recommendations, benefits, and timeline to accelerate decisions, buy-in, self-accountability, and celebration of wins.
- 03 Life and Org Design™**  
Visual map to accelerates talent training, hiring, provider optimization, and exit planning.
- 04 Responsibility, Authority, Path Charts**  
Visual maps to accelerates delegation, elimination of work, exit mindset, career pathing, and more.
- 05 CX OX™ Chart**  
Visualize your client experiences, staff support, and profits to accelerates decision to shed not-fit clients and eliminate unprofitable servicing
- 06 IDEOS™ Lean® Processes**  
Redesigned processes to maximize team and tech usage, eliminate work. Increase productivity and train new hires.
- 07 Tech and Automation Map**  
Tech logo and data flow map to eliminate shiny objects, increase capacity, identify automation and optimization opportunities.
- 08 Time and Energy Map**  
Identify peak energy and time flows and optimize time blocking and meeting schedules for best results, increased productivity, and improved culture of respect.

# Our IDEOS™ Improvement Mantra



## **I** Integrate

Identify, educate and implement tech integrations to reduce the work



## **D** Delegate

Create processes to power delegate the work and monitor operations



## **E** Eliminate

Eliminate unnecessary work through automation and process improvements



## **O** Outsource

Identify and integrate outsources to further streamline your operations



## **S** Staff

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

## Want More ?



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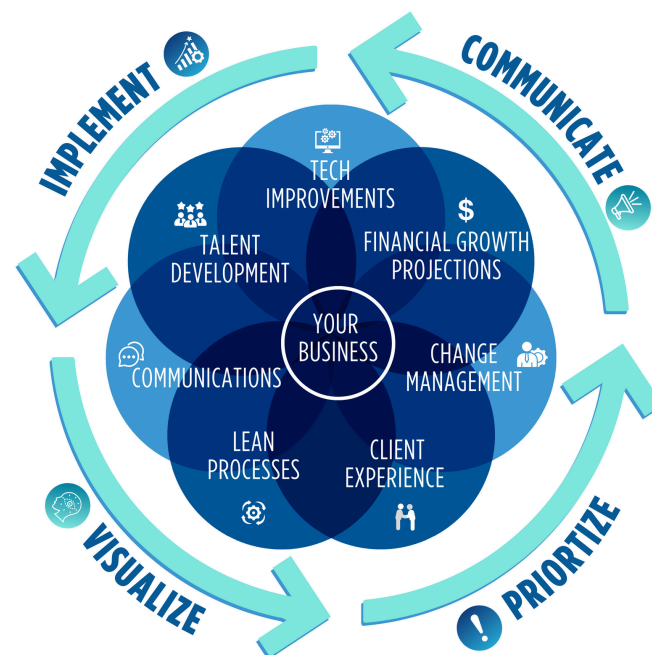
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**MY VIRTUAL COO**  
SCALING SERVICE BUSINESSES



# SPEED TO SUCCESS AND MARKET