

The Roadmap & Member Journey

	People & Culture	Sales & Marketing	Cash & Finance	Strategy & Vision	Leadership	Systems & Processes
Scale \$5m + Freedom from business, focus on wealth building and capital growth	The Upside-down Funnel™ ☐ Performance Review & Management PDP's ☐ The Leadership Bench™ ☐ Benefits, Bonuses & Growth [Leadership] ☐	Market Share Maximisation ☐ Product / Service [Define & Refine] ☐ Build Sales Team ☐ Marketing Library ☐	Business Valuation ☐ The Cash Free-Up Workshop ☐ Balance Sheet Management ☐ Risk Management ☐ Alternative Revenue & Back - End Margin ☐	Expanding the Vision ☐ Vision is Alive ☐ Structure for Scale ☐ Governance Structure ☐ Strategic Buy-ins ☐	Leadership sabattical ☐ Your New Identity Conversation ☐ Acquisition strategy ☐ CEO Exit & life structure ☐ Succession Strategy ☐	Scale Prototype Model ☐ Financial Model Structure ☐ Online S&P Guides (Incl Videos training) ☐
Thrive \$2m - \$5m Freedom from operations, focus on systemising and scaling current structure	Employer of Choice Workshop™ ☐ The Career Ladder™ ☐ Performance Culture Workshop ☐ Great Manager Programme ☐ DISC profiling ☐	The New Customer Experience™ ☐ The Lagniappe Experience™ ☐ The Self Perpetuating Marketing System™ ☐ Advanced Sales Training™ ☐ Advanced Digital Media ☐	Front End Margin ☐ Profit Model Building ☐ Cashflow Forecast ☐ Safety Structure Workshop™ ☐	The Product / Service Package Workshop ☐ Breaking New Ground - Creating an Iconic Business ☐ Group Business Strategy & Structure ☐	Personal BHAG ☐ Board of Directors ☐ Leadership training for Executive team ☐	Organisational Structure Model ☐ Operational Map & A-Z ☐ Customer Communications Scripts ☐
Alive \$500k - \$2m Stepping back from operations, implementing systems & standardisation	Recruit Right™ ☐ Powerful Productive Teams™ ☐ PDP's ☐ The Customer Experience™ ☐ eNPS™ ☐	Brand Definition Workshop ☐ Target Avatar Session ☐ The Customer Experience™ ☐ Brand Promise™ Workshop (BOB, MPOD & RRTB) ☐ Social Media Masterclass ☐	Front End Margin ☐ 3 Bucket Maximisation ☐ The LIVE Dashboard™ ☐ Margin Session ☐	Strategic Alignment Workshop™ ☐ Vision - BHAG™ ☐ What We <i>Really</i> Do and How We Do it™ ☐	Your Vivid Vision™ ☐ Leadership Style Workshop™ ☐ The Value of Values™ ☐ Effective Delegation & Job design ☐	The Five Critical Processes™ ☐ The Sales Process™ ☐ CRM System ☐ Customer Maximisation System™ ☐
Survive \$100k-\$500k Focus on sales growth, building brand and customer satisfaction	Meeting Rhythms™ ☐ Role Scorecards ☐ Daily Toolbox's ☐ Virtual Bench™ ☐	Target Market Session ☐ Digital Marketing Setup ☐ Social Media Kickoff™ ☐ The Sales Ramp™ ☐	Pricing for Profit ☐ The 3 Bucket Budget™ ☐ Breakeven calculation ☐ The Perfect P&L™ ☐ The Cash Plan™ ☐	Quarterly Strategic Priorities (QSP)™ ☐ 1 Page Strategic Growth Plan™ ☐ 2 Week Sprint Plan™ ☐ Tighten the Offer - The Five One's™ ☐	The Masters Mindset™ ☐ Three Types of Work Alignment™ ☐ My Role - The Gerber Realisation™ ☐	The Stop Doing List ☐ The Five Circles™ ☐ Product/Service Delivery Map ☐



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Also: 4 x Quarterly reviews, team building events, hotseats, Q&A Sessions, 1:1 Sessions, additional programmes when released