

Objectives (2 Day)

- Master FD tools
- Clear Vision
- Clear plan
- Issues List clear

Agenda (2 Day)

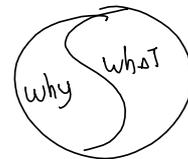
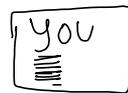
- Check In
- Review FD tools
- Core Values
- Core focus
- 10yr target
- marketing strategy
- 5yr picture
- 1yr plan
- Rocks
- Issues List
- Next Steps
- Conclude

EOS Foundational Tools

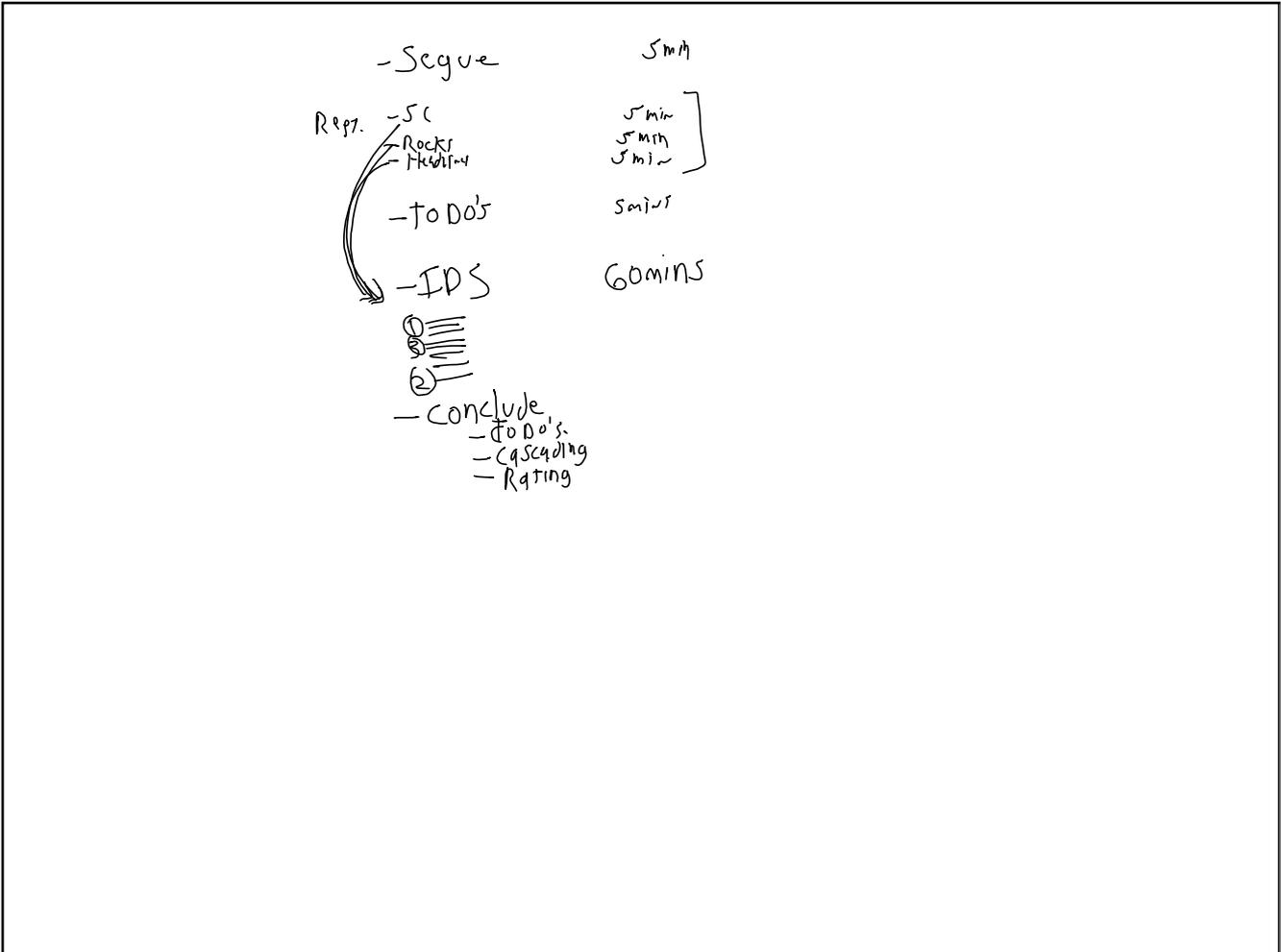
- VTO
- Accountability chart
- Rocks
- Meeting pulse
- Scorecard

- ① Hire
- ② Review
- ③ qtrly mtg.

- ① Right structure
- ② RP/RS
- ③ Enough time



Love/Great	Like/Good
Don't Like Good	Don't Like NOT Good



ISSUES

L10 - SC: new contracts →? (MAL)
- Revisit "Niche" (what we do)

V10 - 10 yr target?

= Need Proven PROCESS

= Need to Define Guarantee

- Marketing Strategy for Tier I?

V10 - Qtrly Reports

V10 - Time Entry

V10 - SOP for every task in teamwork (Level III Process Doc)

V10 - Design speed/slow

L10 - Hitting Deadlines (Internal Projs)

L10 - Profitability

L10 - too much on JB's plate - falling behind

L10 - who owns CUST. STRUC?

L10 - Health INS. cv/JB, whole ofc?

Goals 1-year	Rocks 90Days	ToDo's 7Days	ISSUES	
			L+(90d)	S+(90)
			Vto	L0

3yr

Date: 12/31/2020

Rev: \$1.2m

Profit: \$300k

measurable: 300 T2
2018

- All Process Documented/
QMS (Quality Mgmt Sys)

- Clear Purpose/Vision
+ How ALL (YOU) fit in

- Personal Development Plan for all

7RPRS

- CV/Job

- 1 Dev

- 1 Designer

- 2 AM

- Utility

- Working Flywheel

~~eff~~ (Mktg, Sales, Ops, Admin, or Sys ^{Success})

- Health Care Benefits for all FT

- Remote Fridays

- Qtrly Wm Parties

- acceptable \$ for ~~job~~

- Time available for quality work for all

- Highly collaborative

- Everyone paid what their worth

- Core Proc. Doc, simplified FBA

1yr Plan

Date: 12/31/18

Rev: \$750k

Profit: \$180k

MAS: 88%
15+1

- 4 mktg Initiatives implemented on track

- Formal EMP. Review process in place

- Core Proc. Documented, Simplified

- Proven process in use

- Guarantee in place

- CV [- Defined + Branded process for SPFG (P.P.)
- CV [- Guarantee for SPFG
- R* - Ad Campaigns Designed + running for SPFG w/ Defined Goals + Measures in place
- CV - SPFG "Lite" (retainer, SEO, PPC) Defined + Mktg Materials Approved by LT
- JB - Create + Implement Emp Review Process
- JB - Core Processes Defined
 - ~~SA for every task + teamwork~~
- JB* - Roll out EOS - VTO, AC - 7/2
- JB - RPRS **People Analyzer** Updated for all emps (RPRS/GWC)
- CV - Imp 4 Marketing Initiatives

<u>TIER 1</u>	<u>TIER 2</u>
<u>TIME</u> <u>IMPACT CREATIVE</u> <u>KUND CREATIVE</u> COSMITTO / COMMUNITY FCU PGH INT. CONSULTING	<u>PRODUCTS</u> <u>COMP:</u> DIY'S / STATUS QUO WIX / SQUARESPACE LOW-COST FREELANER REV LOCAL WEB.COM HIGHER / MTGES.COM

<p>Target Market "thelisi" Demo Geo Psycho</p>	<p>D: book - Sm, 3 yrs to 12 owners 30, 40k-120k in come, Local focused B2C w/ brick + mortar, within G: 100 mile radius of P&H who have done sales/marketing before, love control, like to learn, lost conscious, want to see it think they can be expert at everything, love to poke holes, want clear pricing, self-sufficient/needed impulsive</p>
<p>3 uniques</p>	<p>- Speed - Client control - Very structured process (size, custom, consistency)</p>
<p>Proven process</p>	<p>Y/N</p>
<p>Guarantee</p>	<p>Y/N</p>

3 Step Proc. Documenter

- HR
- Mktg
- Sales
- OPS_{1,2,3}
- Acctg.

I Core process

II Sub-process

III → SOP

IV

V

