



3X: Catalyze Your Business Growth

What is 3X?

3X is a highly structured, intensive 6-month growth accelerator specifically designed for business owners like you. You'll learn alongside a small group of like-minded peers.

Drawing from a decade of experience working with thousands of business owners, we've streamlined our approach to focus on what truly matters as you're getting out of the gates and into a scalable model: Financials, Sales and Marketing.

3X is a lot of hard work, and it will challenge you in many ways. But if you're fully committed to it, it will be transformational. You can reasonably expect to 3X your business within 12-24 months.

How Does 3X Work?

You'll meet twice per month with a select cohort of only 10 business owners. Each session lasts for 2 hours and is led by [Angi Semler Welch](#), a partner and Business Advisor at Cultivate Advisors. To further enhance your learning, you can also take advantage of weekly office hours for personalized guidance from your advisor.

3X scholars also benefit from:

- **Community:** Connect with and learn alongside other like-minded peers who are experiencing the same joys and challenges of entrepreneurship. You can also connect with the larger 3X Alumni Community**, providing you with a vast network for networking and advice. (** *Coming in 2024*)
- **Extensive Learning:** Access more than 40 hours of high-quality training modules covering critical areas like Financials, Sales, Marketing, Recruiting, Leadership, and Productivity. These modules are designed for you to work through at your own pace, allowing you to master the essential skills needed for business success.
- **Advanced Tools:** Gain complimentary access to LivePlan, a cutting-edge financial forecasting and trending software that empowers you to make data-driven decisions and map out a strategic path for your business's future.

3X Curriculum

Session	Topic	What To Expect
Pre-Work		<p><u>Productivity:</u> Priority Management Fundamentals & Time Hacks</p> <p><u>Onboarding & Expectations:</u> About Cultivate Advisors 3X Expectations & Keys to Success 3X Technology Tutorial</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> Take Pre-Course Survey
1	Kick Off Vision Financial Fundamentals Part 1	<p><u>Kickoff:</u> Meet Your Cohort</p> <p><u>Vision:</u> Vision & Goal Clarity Using Visualization Your 3-Year Plan</p> <p><u>Financial Fundamentals Part 1:</u> Introduction to Revenue, Cost of Goods Sold (COGs), Gross Profit, Fixed Expenses and Net Profit</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> Research "What You Need (\$)" for Your 3-Year Goal Your 3-Year Plan: Build Out the Financial Section
2	Financial Fundamentals Part 2 Understanding Profit Per Unit	<p><u>Financial Fundamentals Part 2:</u> Introduction to Gross Margin, Contribution Margin and Break-Even Point Understanding Your Current Financial Benchmarks</p> <p><u>Understanding Profit Per Unit:</u> How to Calculate Profit Per Unit</p> <p><u>Work To Complete:</u></p> <ul style="list-style-type: none"> Profit Per Unit Calculations
3	Financial Fundamentals Part 3 Understanding Cash Flow	<p><u>Financial Fundamentals Part 3:</u> Using Break-Even Point to Make Sound Business Decisions and the Long-Term Benefits of Incremental Changes</p> <p><u>Understanding Cash Flow:</u> Building a Cash Flow Forecast: Revenue Projections and Cost of Goods</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> Create a Plan to Improve Profit Per Unit Build Your Cash Flow Forecast: Revenue & COGs Projections
4	Cash Flow Forecasting	<p><u>Building a Cash Flow Forecast:</u> Expenses, Distributions & Debt</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> Build Your Cash Flow Forecast: Operating Expenses, Distributions & Debt

5	Ideal Clients & Sales Process Part 1	<p>Progress Check: Cash Flow Forecast Introduction to Client Avatars Anatomy of an Effective Sales Process</p> <p>Work to Complete:</p> <ul style="list-style-type: none"> • Create Your Ideal Client Avatars • Build or Refine Your Sales Process
6	Sales Process Part 2 & Sales Conversion Skills	<p>Workshop: Peer Feedback on Client Avatars & Sales Process</p> <p>Sales Conversion Skills: POAD, Open-Ended Questions, Needs Finding, and Matching Needs with Benefits</p> <p>Work to Complete:</p> <ul style="list-style-type: none"> • Revise Client Avatars & Sales Process Based on Peer Feedback • Role Play Needs Finding & Matching Benefits
7	Sales Conversion Skills Part 2	<p>Sales Conversion Skills: Overcoming Objections, Building Urgency, Trial Closing</p> <p>Workshop: Write Responses to Common Objections, Identify Objections for Pre-Emptive Strikes, and Draft Trial Closing Questions How to Track Sales Conversions</p> <p>Work to Complete:</p> <ul style="list-style-type: none"> • Role Play Overcoming Objections, Pre-Emptive Strikes and Trial Closing • Your 3-Year Plan: Build Out the Sales Section
8	Marketing Plan Part 1	<p>Marketing: Strategies & Tactics Brainstorm Calculating Number of Leads Building Your Marketing Plan</p> <p>Work to Complete:</p> <ul style="list-style-type: none"> • Build Your Marketing Plan: Select Strategies and Tactics Tied to Your Ideal Client Avatars and Number of Leads Needed
9	Marketing Plan Part 2	<p>Workshop: Peer Feedback on Your Marketing Plan Marketing Budget (Time & Money) Tracking Lead Sources & Marketing ROI</p> <p>Work to Complete:</p> <ul style="list-style-type: none"> • Revise Marketing Plan Based on Peer Feedback • Get & Give Feedback from Another Peer • Build Your 3-Year Plan: Marketing Section

10	Your 3-Year Plan	<p>Presenting Your 3-Year Plan</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> ● Revise Your 3-Year Plan and Cash Flow Forecast Based on Peer Feedback
11	Goals to Actuals: Monthly Review Skill Build CEO Roundtable	<p>Transition to Growth Group Format</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> ● Begin to Implement Your 3-Year Plan and Monitor Key Metrics
12	Goals to Actuals: Monthly Review Skill Build CEO Roundtable Graduation	<p>Transition to Growth Group Format</p> <p><u>Work to Complete:</u></p> <ul style="list-style-type: none"> ● Begin to Implement Your 3-Year Plan and Monitor Key Metrics <p><u>Graduation:</u> You did it! Most work a year to get this type of work implemented into their business, yet you did it in 6 months. Let's review what you've accomplished and what's on the to-do list to ensure you continue your scale.</p>

How Much Does It Cost?

3X is \$750 per month for a minimum of 6 months. Payment is processed monthly.

How Do I Apply?

3X is designed exclusively for business owners who have less than \$500,000 in revenue. It is ideal for entrepreneurs who:

- Have at least \$100,000 in revenue.
- Have been in business for at least 2 years.
- Work full-time in their companies.
- Are hungry for growth and change.
- Are committed to putting in the hard work.

To learn more, [schedule your initial call with our 3X team today](#).

Have other questions? Reach out to 3X@cultivateadvisors.com. We cannot wait to go on the 3X journey with you!