

3X Curriculum

SESSIONS 1 - 5

PRE WORK

Productivity: Priority Management Fundamentals & Time Hacks
Onboarding & Expectations: About Cultivate Advisors | 3X Expectations & Keys to Success | 3X Technology Tutorial

KICK OFF | VISION | FINANCIAL FUNDAMENTALS

Vision: Vision & Goal Clarity Using Visualization | Your 3-Year Plan
Financial Fundamentals Part 1: Introduction to Revenue, Cost of Goods Sold (COGs), Gross Profit, Fixed Expenses and Net Profit

FINANCIAL FUNDAMENTALS PART 2 | UNDERSTANDING PROFIT PER UNIT

Financial Fundamentals Part 2: Introduction to Gross Margin, Contribution Margin, and Break-Even Point | Understanding Your Current Financial Benchmarks
Understanding Profit Per Unit: How to Calculate Profit Per Unit

FINANCIAL FUNDAMENTALS PART 3 | UNDERSTANDING CASH FLOW

Financial Fundamentals Part 3: Using Break-Even Point to Make Sound Business Decisions and the Long-Term Benefits of Incremental Changes
Understanding Cash Flow: Building a Cash Flow Forecast: Revenue Projections and Cost of Goods

CASH FLOW FORECASTING

Building a Cash Flow Forecast: Expenses, Distributions & Debt

IDEAL CLIENTS & SALES PROCESS PART 1

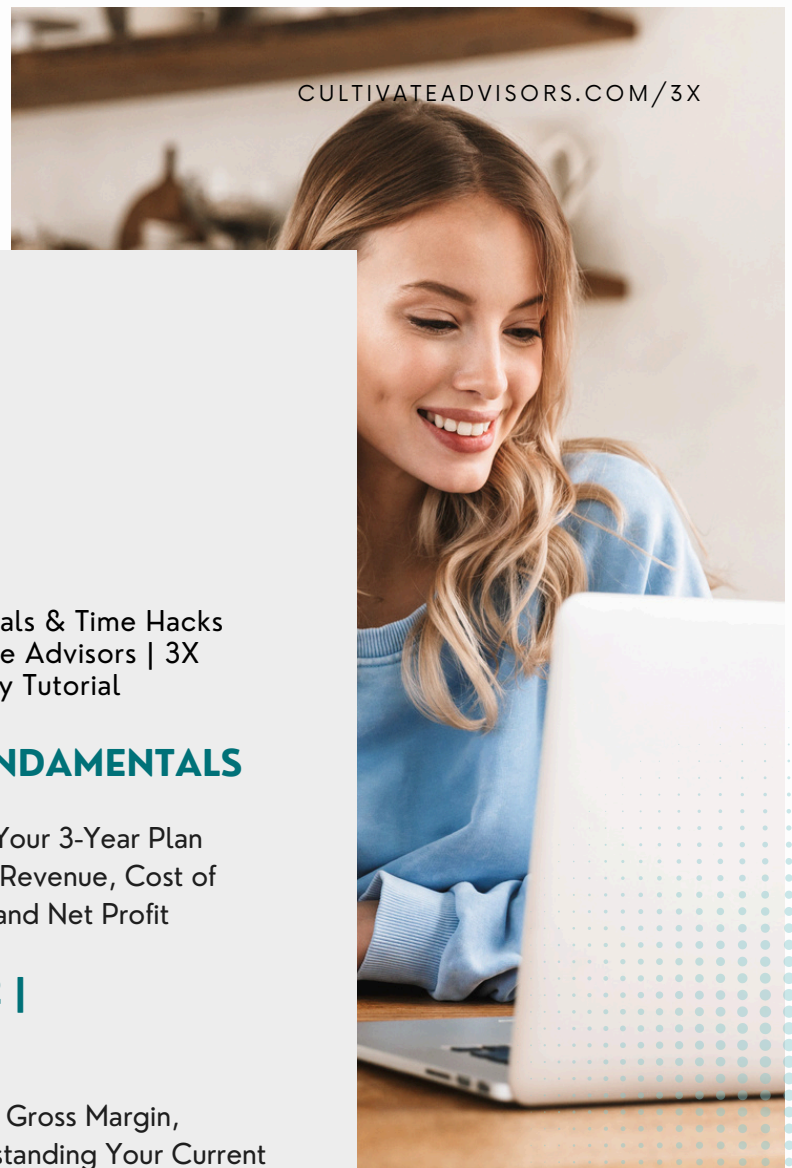
Your Ideal Client Profile: Introduction to Client Avatars | Anatomy of an Effective Sales Process

How Does 3X Work?

The program follows a 6-month schedule. You'll meet **twice per month** with your cohort for **2 hours each session**.

The first 4 months are dedicated to mastering the core curriculum and crafting a **3-year business plan**.

The final 2 months focus on intensive advising to implement your plan and track progress.



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SESSIONS 6 - 12

SALES PROCESS PART 2 & SALES CONVERSION SKILLS

Workshop: Peer Feedback on Client Avatars & Sales Process
Sales Conversion Skills: POAD, Open-Ended Questions, Needs Finding, and Matching Needs with Benefits

SALES CONVERSION SKILLS PART 2

Sales Conversion Skills: Overcoming Objections, Building Urgency, Trial Closing
Workshop: Write Responses to Common Objections, Identify Objections for Pre-Emptive Strikes, and Draft Trial Closing Questions | How to Track Sales Conversions

MARKETING PLAN PART 1

Your Marketing Plan: Strategies & Tactics Brainstorm | Calculating Number of Leads | Building Your Marketing Plan

MARKETING PLAN PART 2

Workshop: Peer Feedback on Your Marketing Plan | Marketing Budget (Time & Money) | Tracking Lead Sources & Marketing ROI

YOUR 3-YEAR PLAN

Presenting Your 3-Year Plan

GOALS TO ACTUALS: MONTHLY REVIEW | SKILL BUILD | CEO ROUNDTABLE

Transition to Growth Group Format

GOALS TO ACTUALS: MONTHLY REVIEW | SKILL BUILD | CEO ROUNDTABLE | GRADUATION

Transition to Growth Group Format



Meet the Facilitators



Angi Semler Welch



Spike McDougall