

3X Curriculum

GET READY FOR KICK OFF

Maximize Your Potential: Begin your journey by embracing Priority Management & Time-Saving Hacks with this self-paced, online course. Plus, familiarize yourself with 3X Expectations and Keys to Success.

Action Steps for Success:

- Take the Pre-Course Survey
- Meet with Your Advisor to Plan for Your 3X Success

KICK OFF | CREATING YOUR PERSONAL VISION

Build the Future You Dream Of: Kick off by meeting the like-minded business owners in your 3X Cohort. Then, tap into the power of Visualization to craft a vision for your life and business.

Action Steps for Success:

- Research "What You Need (\$)" for Your 3-Year Goal
- Build the Financial Section of Your 3-Year Plan

FINANCIAL FUNDAMENTALS | UNDERSTANDING PROFIT PER UNIT

Financial Fundamentals, Pricing & Profitability: Master the building blocks of your business finances by demystifying key financial terms. Learn how to calculate net profit per unit of sale and understand why it's crucial to overall business profitability.

Action Steps for Success:

- Begin Profit Per Unit Calculations for Your Business

FINANCIAL FUNDAMENTALS & PROFIT PER UNIT WORKSHOP

Financial Fundamentals Part 2: Gain clarity on your current financial benchmarks and discover how to use "*break-even point*" to make sound business decisions. Then, tackle the numbers to evaluate how price and volume affect your profitability.

Action Steps for Success:

- Develop Your Profitability Plan

UNDERSTANDING CASH FLOW & CREATING A CASH FLOW FORECAST

Understand Cash Flow: Master the lifeline of your business with cash flow principles made simple, strategies to increase cash in your business, and forecasting for the future.

Action Steps for Success:

- Create Your 1-Year Cash Flow Forecast
- Spot Cash Flow Opportunities & Challenges

How Does 3X Work?

The program follows a 12-month schedule. You'll meet **twice per month** with your cohort for **2 hours each session**.

The first 6 months are dedicated to leveling up your business acumen and crafting an actionable, **3-year business plan**.

The second half is focused on implementing your plan and includes dedicated, 1-1 time with your Business Advisor.

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IDEAL CLIENTS | SALES PROCESS PART 1

Unlock the Secrets to Sales Success: Identify and define your ideal client profiles and discover the anatomy of a winning sales process.

Action Steps for Success:

- Craft Your Ideal Client Avatars
- Design or Revamp Your Sales Process

SALES PROCESS PART 2 | SALES CONVERSION SKILLS

Master the Art of Closing Deals: Gain peer feedback on your client avatars and sales process. Then delve into sales conversion skills, such as P.O.A.D. framework, asking open-ended questions, and matching needs with benefits.

Action Steps for Success:

- Refine & Finalize Your Client Avatar & Sales Process
- Sharpen Your Sales Skills through Role-Playing Exercises

SALES CONVERSION SKILLS PART 2

Master Objections and Learn How to Close Deals: Learn how to overcome objections, build urgency, and practice trial closing in the sales process.

Action Steps for Success:

- Role Play & Practice Overcoming Objections
- Add Sales Insights into Your 3-Year Plan

MARKETING PLAN PART 1

Your Marketing Plan: Turn ideas into action with our Marketing Strategies & Tactics Brainstorming session. Then determine the number of leads required to achieve your goals and create a targeted marketing plan to reach them.

Action Steps for Success:

- Draft Your 12-Month Marketing Plan

MARKETING PLAN PART 2

Refine Your Marketing Plan: Share your marketing plan with a peer for constructive feedback. Next, discover how to allocate your time and budget effectively to maximize marketing impact, while learning to evaluate your return on investment (ROI).

Action Steps for Success:

- Revise Marketing Plan Using Your Peer Feedback
- Build Out the Marketing Section of Your 3-Year Plan

ROCKSTAR RECRUITING PART 1

Recruit for Top Talent: Build your Dream Team by learning how to attract, interview and hire A Players. Understand how to keep top talent engaged and thriving within your organization.

Action Steps for Success:

- Draft Your Step-by-Step Hiring & Interview Process

