

Small/Medium Business - MBA

On the Monday before class, each participant will have access via LINK to that week's content which will include:

- Session 1 Agenda (**Sample attached. Links won't be active until you sign up**)
- Tools
- Supporting Articles
- Vimeo of the *prior week's* class.
- PDF Copy of this week's PPT slides for note taking.
- Class is \$395 a month for 6 months ... 26 weeks. Once you have been through the course access to ME and the classes for as long as you want to attend. Makeup missed classes or just do them again ... no charge.
- First Class is always FREE as a Test Run.

Class Time: Thursday - Central Time

- 10:45 to 11:am – Questions and Clarification about last week's class and Key Learnings from attendees
- 11:00 to 12:00 – Class time for Workshop / Content
- 12:00 to 12:15 – Open Q & A on Today's Content or?
- After class 1:1's can be arranged as needed.
- Codes to the individual class format and content
 - (W) – Workshop
 - (S) – Seminar
 - (T) – Tool – provided to use by you to implement concepts and drive Results.

Classes will cover:

Time – Productivity, Time Management,

Team – Culture, Hiring, Accountability, HR Process, Community

Money – Strategic Planning, Financial Management, Cash Flow, Revenue, Profitability

- S01 – (W) (T) “5-Ways” to Drive Profitability
 - 460 Strategies to Improve Your 5-Ways
 - (T) 5-Ways Fillable PDF Worksheet
- S02 – (S) “Street Wise Marketing”
 - Every Marketing Dollar is an Investment Not an Expense!
- S03 – (S) “Sales Made Simple”
- S04 – (W) USP and Guarantee
 - Point of Differentiation in a crowded competitive world
 - (T) USP & Guarantee Workbook
- S05 – (W) Ideal Client / Client Retention
 - (T) ABCD Analysis
 - Characteristics of an Ideal Client
 - (T) Current Client Review
- S06 – (W) Lead with Purpose 1 - Strategic Planning –
 - (T) Lead with Purpose – Software – FREE version
 - (S) LwP – Why Strategic Planning
 - (W) (T) Mission, Vision, Cultural Values
- S07 – (W) (T) Lead with Purpose 2 - Quarterly, Annual, 3-Year Goals, SWOT
- S08 – (S) Lead with Purpose 3 – implementing and utilizing for delegation and accountability.
- S09 – (W) (T) Time Management
 - (T) Time Management – online Assessment
- S10 – (W) (T) Key Productivity Indicators (KPI's) / Metrics
- S11 – Selling Below the Priceline™ - Session 1 - Will Robertson – Instructor
- S12 – Selling Below the Priceline™ - Session 2 - Will Robertson – Instructor
- S13 – (W) Vision in Leadership
 - Use of Organizational Charts
 - This Year, Next Year, 3-Years
 - (T) Quarterly Review, Annual Review

- S14 – (W) Strategic Partnerships
 - (T) Board of Advisors (Strategic Partners/Vendors)
 - (T) Financial Advisor - Right Level of On-site Financial Support
 - Legal Advisor – General Counsel vs. Business Attorney
- S15 – (S) How to Read and Effectively Use Your Financial Statements to Drive Change and Performance Improvement.
 - Introduction to Financial Statements
 - Profit & Loss
 - Income Statement (P&L)
 - Cash Flow
 - Types of Cash
 - Managing Financials – Tips
- S16 – (W) Accounts Receivable Management – (T) Process to maintain an Excellent DSO (Days Sales Outstanding)
 - Quoting
 - Use of Terms
- S17 – (W) Team Evaluation – (T) ABCD Analysis – Forced Ranking
 - Protecting Your “A” Players
 - (T) Succession Planning – Are you ready?
- S18 – (W) Hiring Process
 - Use of Assessment in Hiring
 - (T) Sample Hiring Online Assessment
 - Positional Contract vs. Job Descriptions
 - (T) Onboarding Checklist
 - Performance Reviews / Accountability
 - Employee Retention
 - Team Assessments / Team Dynamics
- S19 – (S) Management 1
 - Leadership, Culture & Employee Engagement
 - DISC: Adapting Your Leadership Style
 - Online (T) DiSC Assessment
 - Building Trust

- S20 – (S) Management 2
 - Building Your Emotional Intelligence
 - Online (T) EIQ Assessment
 - Holding “One-to-Ones” & Performance Management Cycle
 - Understanding and Managing Conflict
- S21 – (S) Management 3
 - Art of Giving Effective Feedback
 - Motivating Your Employees
 - Delegation
- S22 – 1 (S) Leadership Intensive 1
 - Leading Teams
 - The Leader as Coach
 - Leading Your Team Through Change
- S23 – (S) (T) Meeting Process
 - Successful Meeting Structure
- S24 – (W) Systems and the 6-Steps
 - 6-Ways Chart to Systematically Grow Your Business
 - Systemize Process
 - (T) Systems Checklist
- S25 – (W) 4-Ways to Leverage Your Business
 - 4-Ways Chart
- S26 – Exit Planning and Owner Centricity
- S27 – Client Onboarding and Client Communication
 - Onboarding Process
 - Client Communication Process
 - Quarterly Review with Key Clients – Sample Deck

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