

	Profitability Planning Intensives (Group)	Streamlined Strategy Retreat	Streamlined Plus (3-Month) Coaching Program	Streamlined Concierge (6-Month) Coaching Program	Streamlined Planning (Full-Year) Program
AUDIENCE	solopreneurs and business professionals				
WHAT'S INCLUDED					
Pre-session questionnaire	✓	✓	✓	✓	(4 - 1 per quarter)
Virtual planning session	Quarterly: 3.5-Hour Group, Annual: 6-Hour Group	✗	✗	✗	✗
In-person lakefront retreat planning/kickoff session(s), includes meals/refreshments, virtual option available	✗	5-hour 1:1 Retreat	3-Hour 1:1 Kickoff Session	3-Hour 1:1 Kickoff Session; 2-Hour 1:1 mid-program planning session	Annual 5-Hour Retreat and 3 Quarterly 2-Hour Planning Sessions
LEAVE THE RETREAT/PLANNING SESSION WITH:					
One-year strategic plan	(Annual program)	✓	✓	✓	✓
3-Month action step checklist	(Annual & quarterly programs)	✓	✓	(2 - 1 per quarter)	(4 - 1 per quarter)
Customized tools & templates	✓	✓	✓	✓	✓
Recordings (video &/or audio)	✓	✓	✓	✓	✓
ONGOING SUPPORT:					
Virtual follow-up sessions	1 - Group office hour	2 - 1:1 Coaching Sessions	5 - 1:1 Coaching Sessions	10 - 1:1 Coaching Sessions	4 - 1:1 Mid-quarter "Keep You On-track" Sessions
Weekly accountability check-ins	✗	✗	✓	✓	✗
Unlimited e-mail/text support	✗	60 days	90 days	180 days	Full Year
Review of materials related to coaching work	✗	60 days	90 days	180 days	Full Year
Free attendance at annual & quarterly group programs held over the course of coaching together	✗	✗	✗	✓	✓