



SCATTERED TO
STREAMLINED

Profitability
Planning
Intensives
(Group)

Streamlined
Business
Audit Hour
(1:1)

Streamlined
Strategy
Retreat
(1:1)

Streamlined
Concierge (6-Month)
Coaching Program
(1:1)

Streamlined
Revenue Accelerator
with bonuses
(Group)

AUDIENCE

solopreneurs and business professionals

WHAT'S INCLUDED

Pre-session questionnaire



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; 2-Hour 1:1
mid-program
planning session



LEAVE THE RETREAT/PLANNING SESSION WITH:

One-year strategic plan

(Annual program)



3-Month action step checklist

(Annual & quarterly
programs)



(2 - 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

10 - 1:1 Coaching
Sessions

Weekly for 3 months

Weekly accountability check-ins



Unlimited e-mail/text support



60 days

180 days



Review of materials related to coaching work



60 days

180 days



Free attendance at annual & quarterly group
programs held over the course of coaching together

