

# VISION

## Core Values



Truth Tellers · Trusted Allies · Faithful Stewards · Servant Leaders · Strategic Doers · Passionate Storytellers · Creative Problem Solvers · Disciplined Learners

### CORE FOCUS™

#### Our Purpose:

We seek to delight our clients, cultivate a creative team, operate in a fun and fulfilling work environment, and foster a better community by funding restorative charitable work.

#### Our Niché:

Tell Your Story. Grow Your Business.

### 10-YEAR TARGET™

\$1 million in charitable giving

1,000 stories told

100 team members RPRS

### MARKETING STRATEGY

#### Target Market:

- \$5-\$75 million in annual revenue
- Growth mindset
- Desire to tell story internally and externally
- Business Owners, C-Level Leaders, Marketing Directors, Sales Directors

#### Three Uniques:

1. Fully outsourced marketing team
2. Specialize in ongoing partnerships
3. Business development team; marketing focused on lead generation and sales enablement

#### Guarantee:

You will always work with a full-time, Louisville-based team.

### 3-YEAR PICTURE™

**Future Date:** December 31, 2022

**Revenue:** \$3 million

#### Measurables:

- Charitable Donations: \$130,000
- Locations: Two
- Team Members RPRS: 30
- Partner Clients: 36
- All core processes documented, simplified and followed by all

# TRACTION

## 1-YEAR PLAN

**Future Date:** November 20, 2020

**Revenue:** \$1,900,000

**Measurables:**

- Charitable Donations: **\$82,500**
- Team members RPRS: **18**
- Partner retention: **85%**
- All core processes documented, simplified and followed by all

**Goals:**

- Develop 3 new product and/or service offerings that meet the needs and demands of the market.
- Grow the team in the areas of storytelling, marketing automation, interpersonal communication, and client relations.
- Develop a long-term model for serving Plan Advisors and their growing network of agents and agencies.
- Build the structure for a fully-functioning Administrative area of the business.
- Create loyalty and raving fans by enhancing the client experience across projects and partnerships.
- Become the go-to marketing agency for business operating on EOS.
- Continue to improve the office environment and team experience.

## COMPANY ROCKS

**By February 25, 2020**

- Develop 2020 Professional Development Plan including SquadU, Pop Ups, Conferences and Trainings – Kevin
- Establish long-term solution for internet and phone service – Kevin
- Office Improvement: Determine Phase 2 budget, plan and timeline including video conferencing solution – Bryce
- Schedule Open House for late March in conjunction with Plan Advisors – Bryce
- Develop Marketing Plan and leadership transition plan – Wayne
- Develop new Website Property Management service offering – Marshall
- Write Core Values Speech (three bullets and two stories for each) by Annual Kickoff – Bryce