



Cultivate Advisors®



Cultivate Advisors™

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# Hello! I'm Andrea Ross

Business Advisor

Founded and was successfully acquired: An award-winning Southeast Asian tourism company with offices in Thailand, Laos, Vietnam, Cambodia & Myanmar.



Cultivate Advisors™



VISION

# A WORLD MADE BETTER BY ENTREPRENEURS

CULTIVATE ADVISORS

# A Banner Year

What  
People  
Won't See



**Success**

*What People See*

Disappointment

Failure

Sacrifice

Hard Work

Persistence

Discipline

Dedication

# A Banner Year



**Success**

*What People See*

**2023 Is Here!**  
**How You Choose To Plan & Be  
Proactive In Your Approach Is Vital**

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# Agenda

01

**Planning  
Methodology**

02

**Self Workshop,  
Peer Discussions**

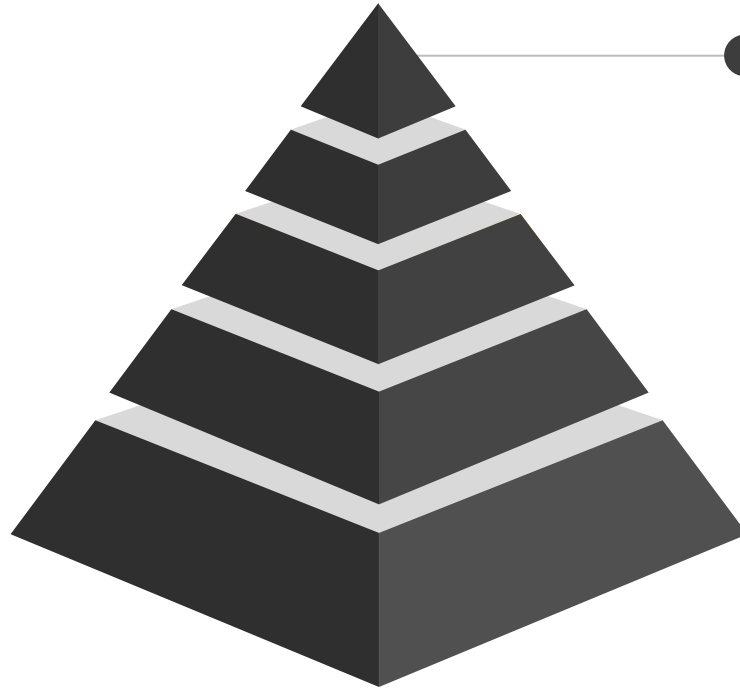
03

**Capture  
Learning**



# Planning Methodology

# Planning Methodology



## Vision & Long Term Goals

1

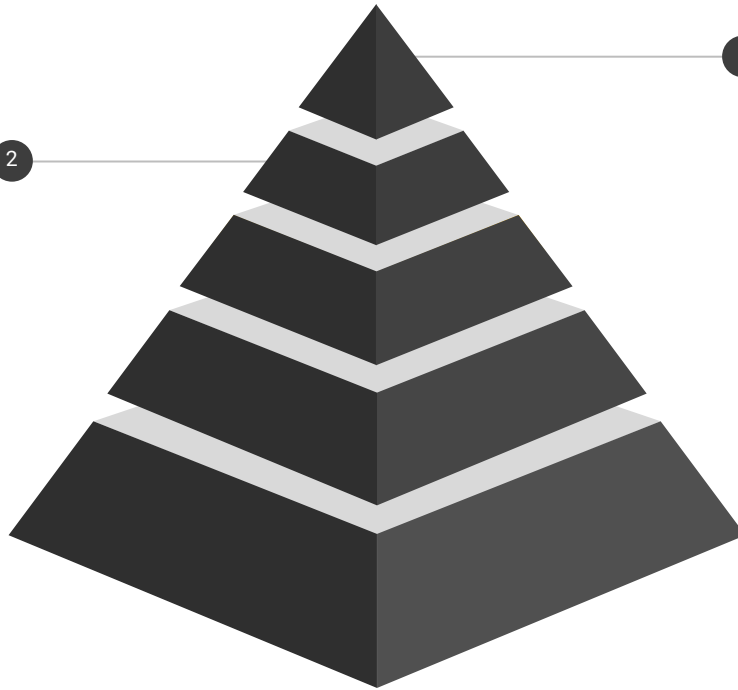
Why are you doing this? What do you want in the next 3, 5 and 10 years?



# Planning Methodology

## Annual Macro Goals Set

What are the three most important metrics you need to hit this next year?



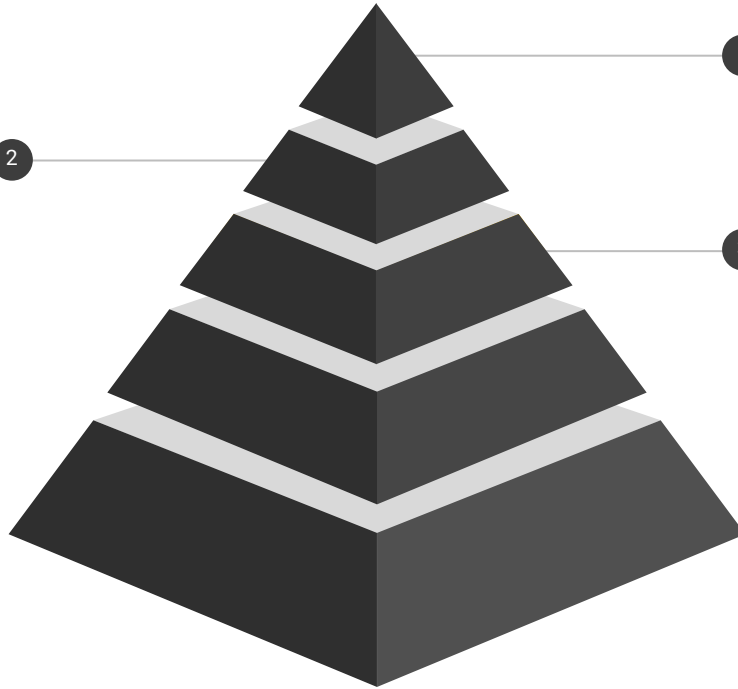
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## KPI's Identified

Push through the micro plans in all areas of the business. What are the key performance indicators?

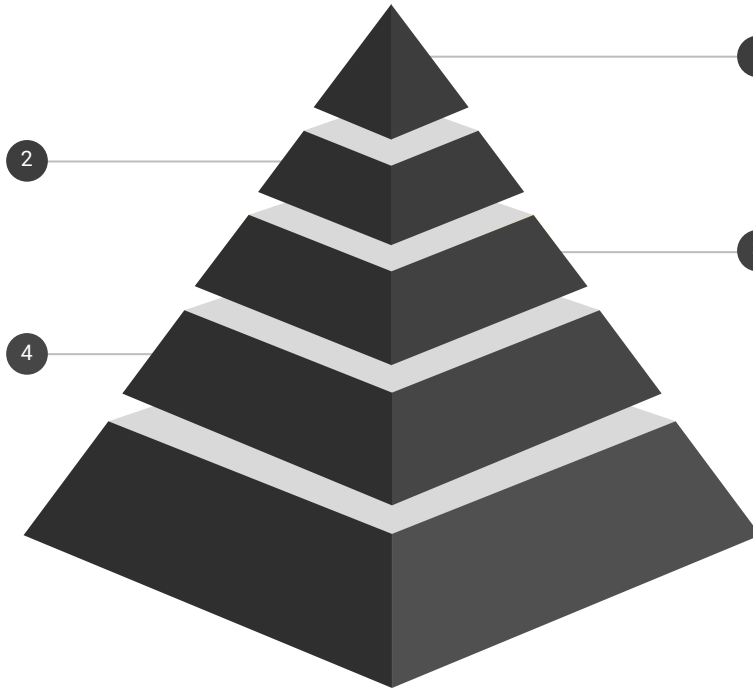
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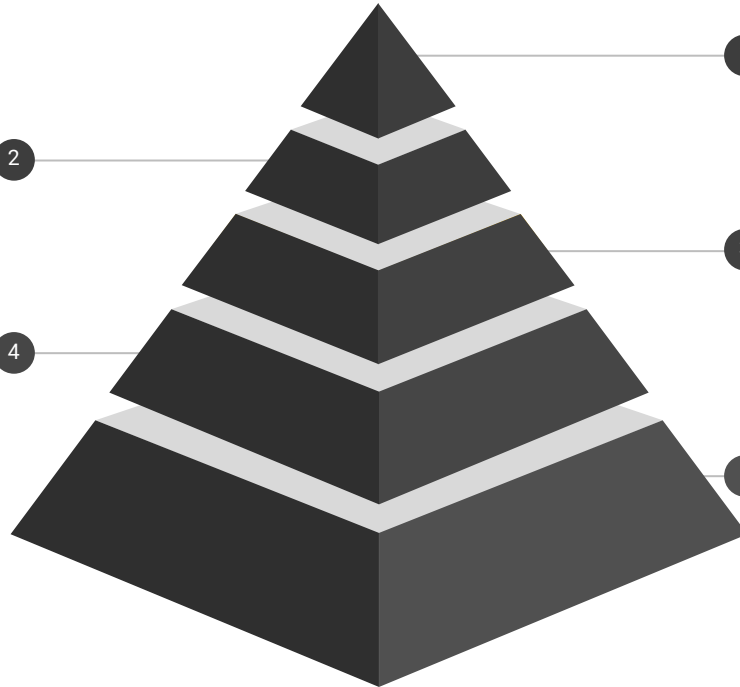
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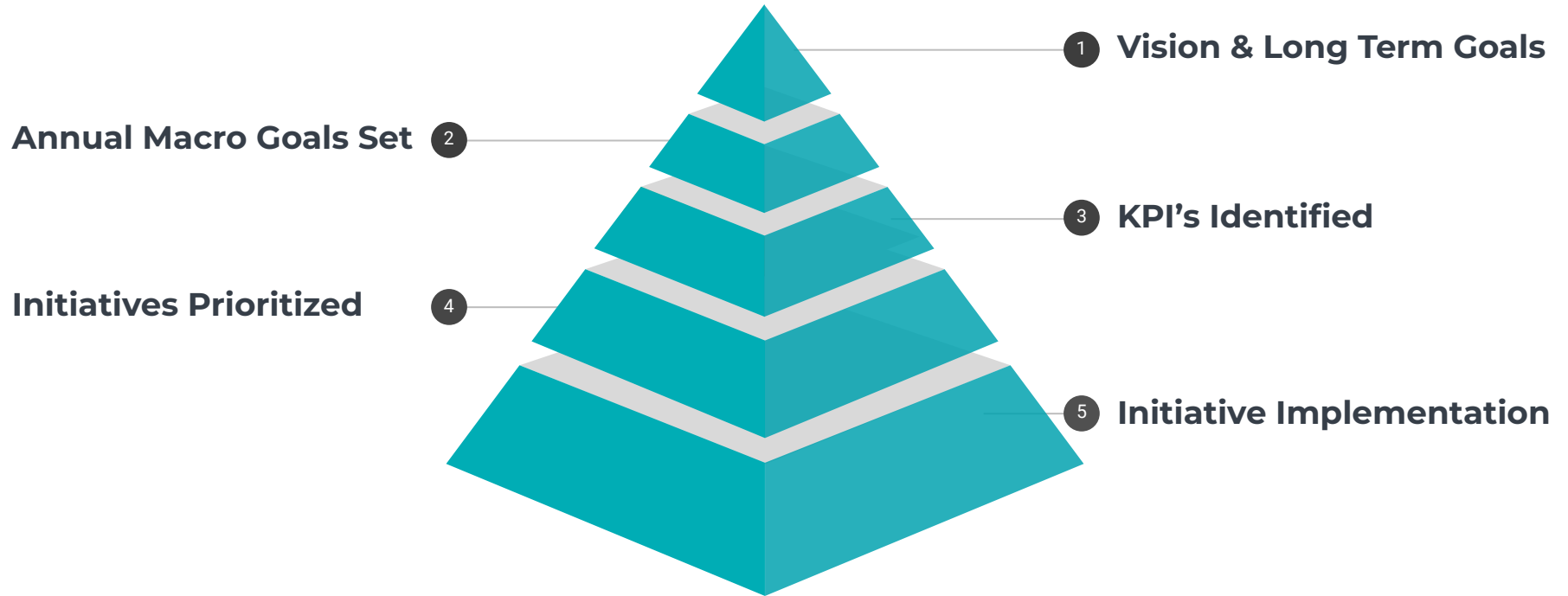
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## Initiative Implementation

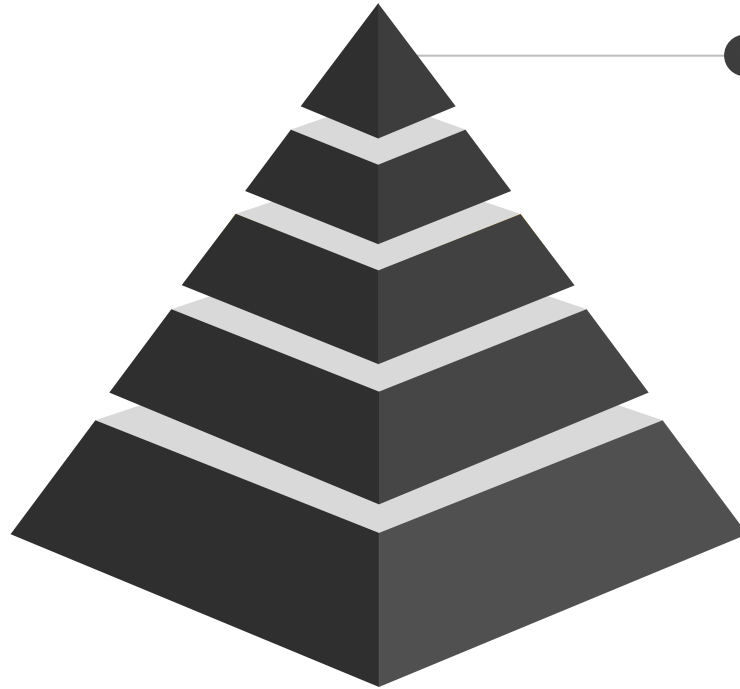
What is the strategy, process, systems, procedures, training & leadership plan to implement the initiatives?

# Planning Methodology



# Planning Workshop & Peer Discussions

# Planning Workshop



## Vision & Long Term Goals

1 Why are you doing this? What do you want in the next 3, 5 and 10 years?

# VISION





# Vision: What's your 3-5 year goal?

- Is it an exit?
- Increase Revenue/Profit by X?
- Is it 10x growth?
- Be the top provider in your segment/location?
- Become a leader in the organization?
- Excel in your role and rise within your company?

# Peer Share

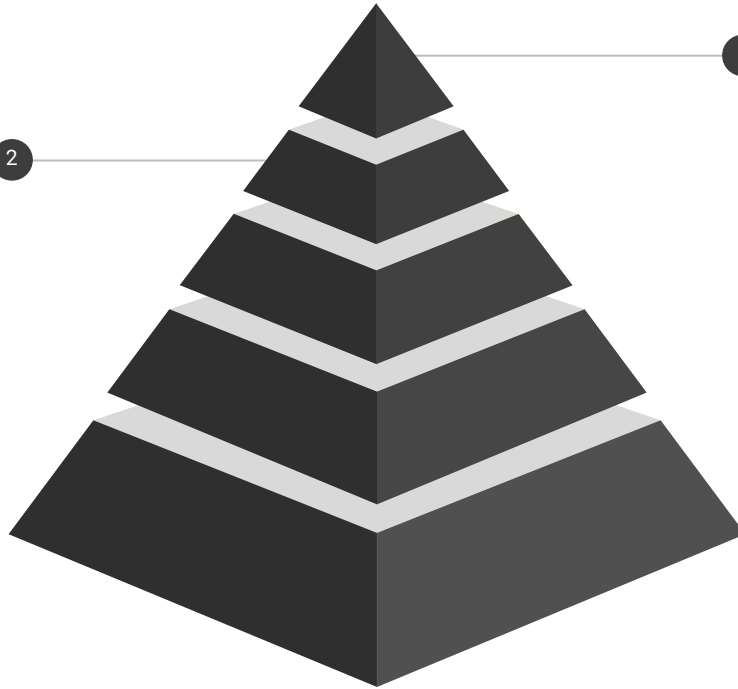
- Be Concise & Share Your Vision
- Gain examples of vision and meet the folks at your table



# Planning Workshop

## Annual Macro Goals Set

What are the three most important metrics you need to hit this next year?



## Vision & Long Term Goals

Why are you doing this? What do you want in the next 3, 5 and 10 years?

# Macro Goals: Pick 2 to 3

- If achieved, would this keep you on track to your vision?
- Will this be easy to measure?
- Common Examples:
  - Revenue, Profit, Retention of Staff, # of Clients Served
- Be specific to your business, and prioritize which 2 or 3 you can shout from the rooftop with your teams.

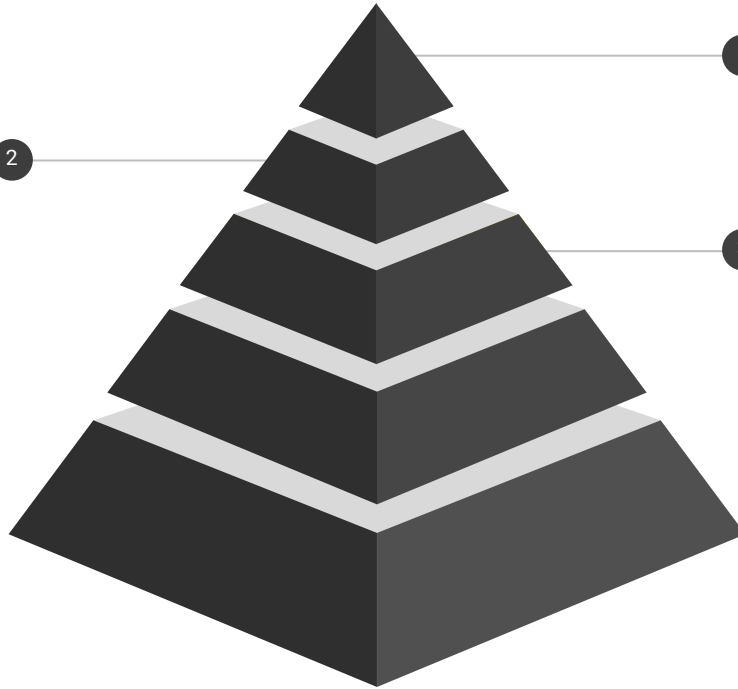
# Peer Discussion

- Is it in pursuit of their vision?
- Hear examples of macro goals by sharing
- Share only what you're comfortable with

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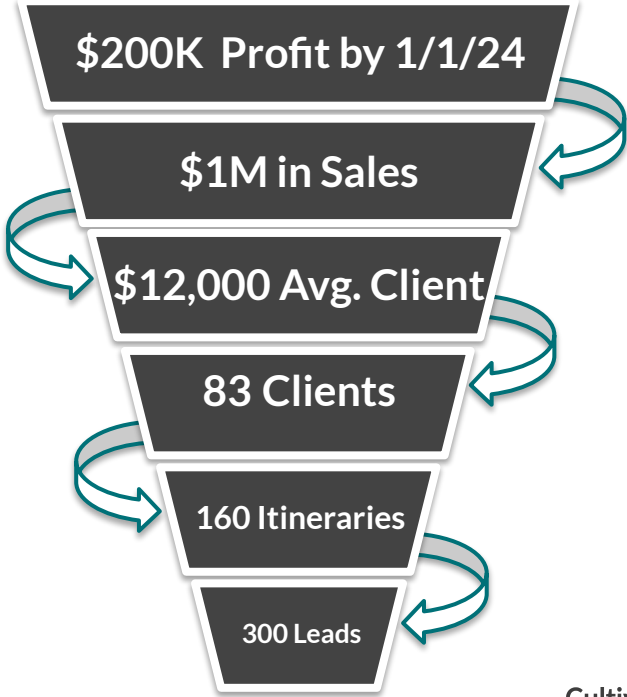
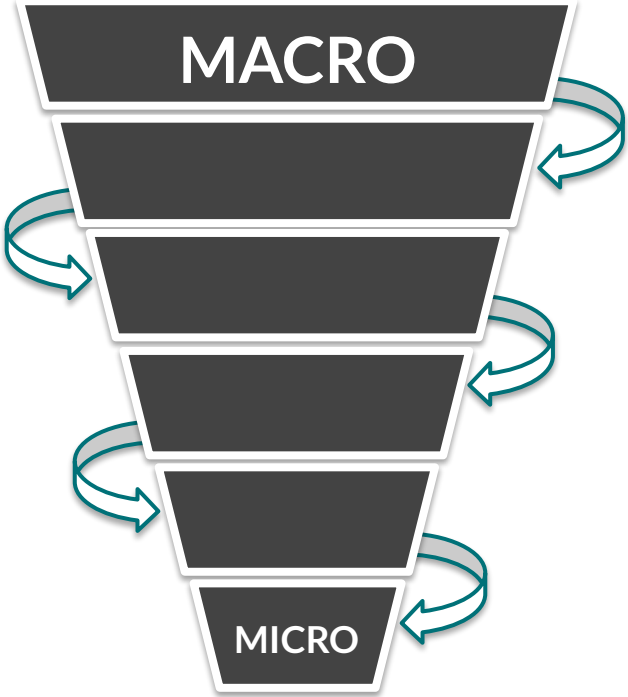
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# Macro to KPI



# Find Your Leading Indicator (KPI)

**Revenue Goal:** \$400,000

**Actionable Goal:** Sell 106,382 Cups

- Open 8.5 Months = 12,515 Cups / Mo.
- Open 37 Weeks = 2,875 Cups / Wk.
- Open 260 Days a Year = 410 / Day
- Open 10 Hours a Day = 41 / Hour
- 60 Minutes in Hour = 1 per 1.46 Min.

**Open 260 Days a Year = 410 / Day**  
Average Purchase = 1.87 Cups  
**# of Patrons = 219 / Day**



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# Breaking Down The Business

**FINANCIALS** are the **ENGINE**

## **GROWTH SIDE**

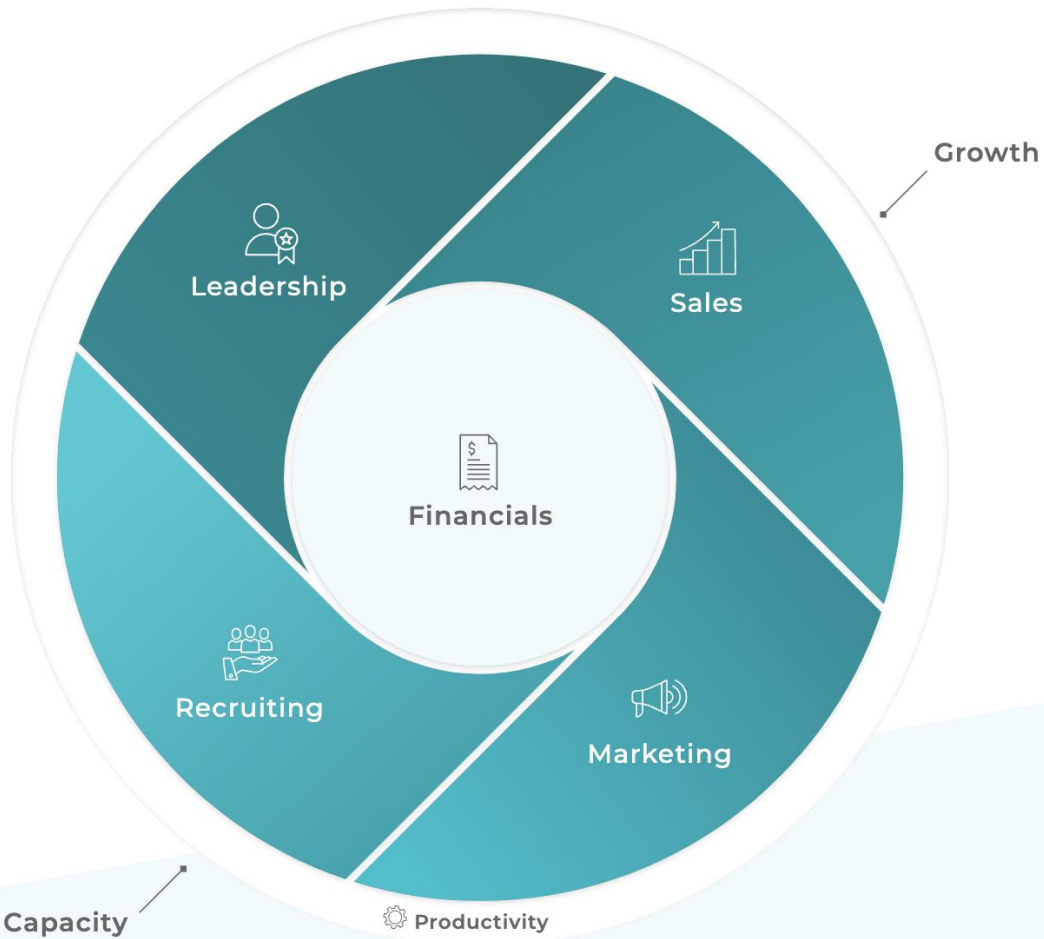
- SALES
- MARKETING

## **CAPACITY SIDE**

- RECRUITING
- LEADERSHIP

## **COLLECTIVELY**

- PRODUCTIVITY



# KPI's: Identify 1 or 2

- Take your macro goals and work them to the micro
- When can you measure? When does it feel control but not over the top?

# Peer Discussion

- Why will this provide you a leading indicator to achieve goal?
- Hear examples of leading indicators



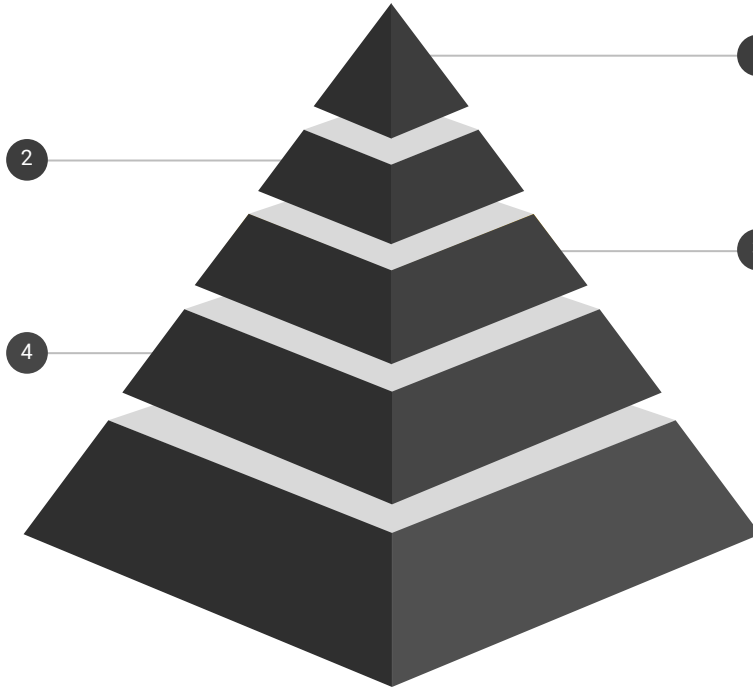
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# Initiatives: Identify 1

- When reviewing gap between where you are now and the KPI identified, create options of what you'll need to do as an initiative.
- Remember, keep it simple and go all in on something to move the needle.

# Peer Discussion

- Buy in that the initiative will solve the KPI gap?
- Hear examples of initiatives
- Discuss other options to achieve KPI gap

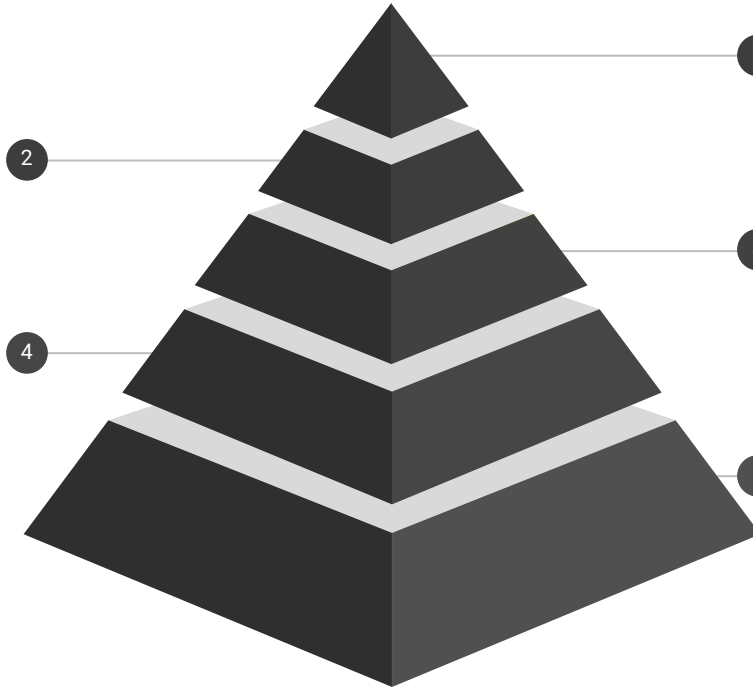
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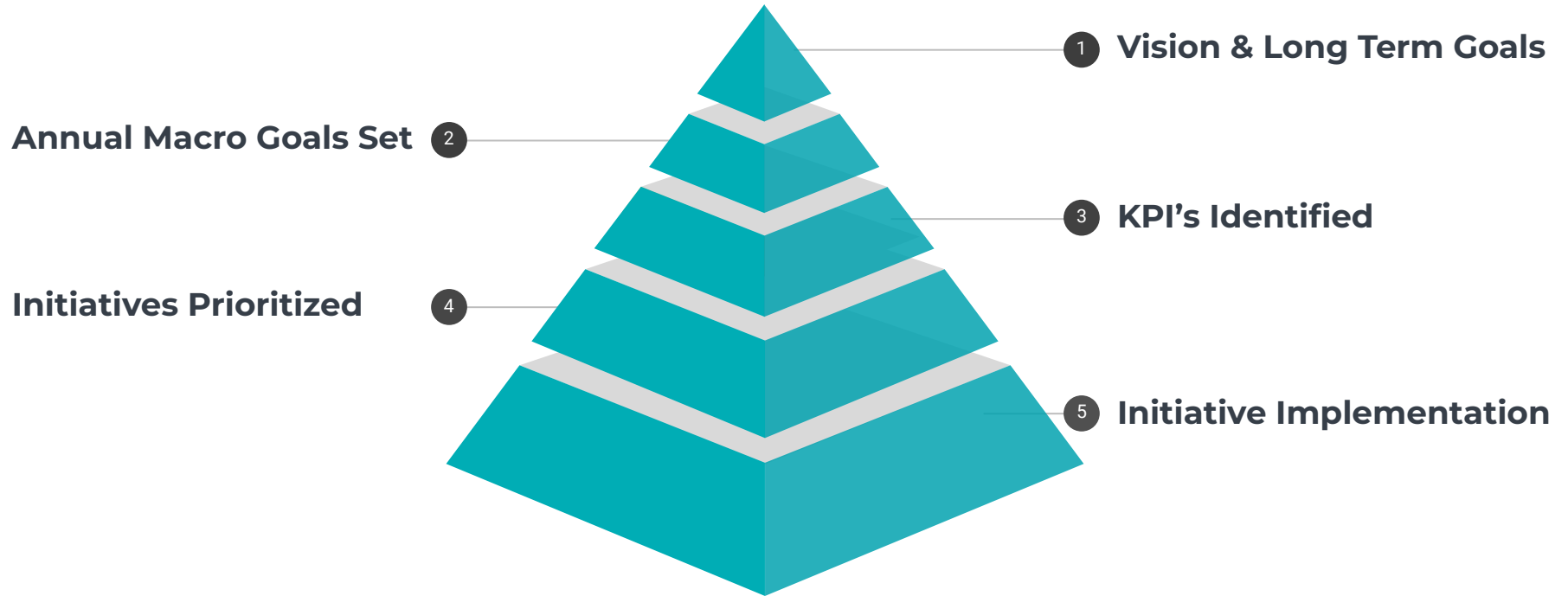
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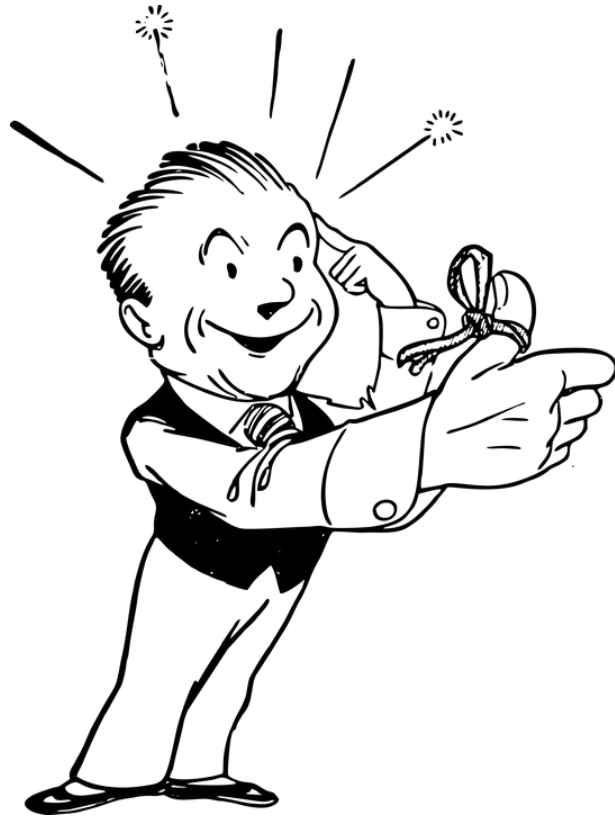
## Initiative Implementation

What is the strategy, process, systems, procedures, training & leadership plan to implement the initiatives?

# Planning Methodology







# PRIORITIZE YOUR TAKEAWAYS

Identify two things from  
today that you never want  
to forget

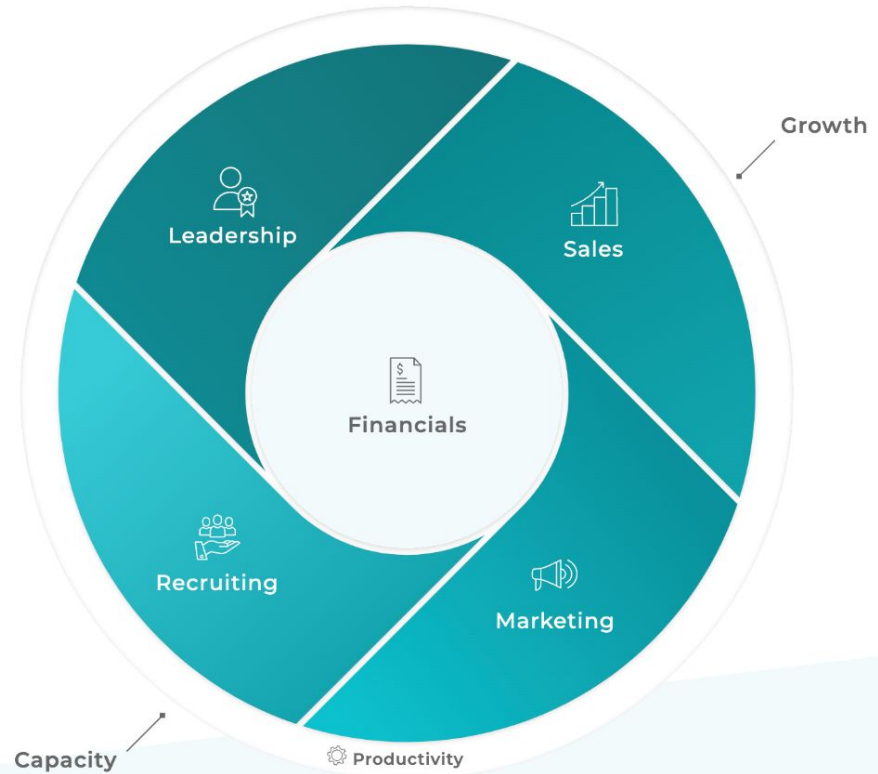
# Continue Your Scale

# Our Unique *Advisory* Methodology

We believe in propelling businesses forward. In working with thousands of business owners, we've developed our Propeller Methodology that guides owners through the turbulence of entrepreneurship.

Our business advisors start with your Financials, then dive deep into Sales, Marketing, Leadership, Recruiting, and Productivity that will all factor into the growth of your business.

We use this methodology to assess the gaps and opportunities in your business. We then create a tailored roadmap that will guide you to your vision and destination.



# INITIATIVE ROADMAP

Skill	Item	Notes/Detail
Financials	KPIs = Goal Accountability	Upgrade KPI's so that the staff has a clear understanding of goals and progress. Previously, only the owners had access to the financials and key metrics that drive the business
Sales	Funnel / Pipeline Creation	Build a sales funnel with conversion metrics and a valid pipeline. Obtain and create a system of data that drives sales initiatives and behavior
Marketing	Monthly & Quarterly Plans	Create a quarterly and monthly marketing plan that we can execute against. Define the branding, messaging, and website presentation. Perform market analysis to gauge strength of competitors and our unique position
Productivity/ Operations	NPS Score	Bottlenecks in the operation need to be removed so that product is delivered on time consistently and efficiently. Build an operational plan that drives customer NPS scores.
Leadership	Performance Culture	Build a performance driven culture that has core values that boost recruiting and retention. Create core values, vision, and standards that attract the best talent, and provide a superior work/life balance for our people
Recruiting	Behavioral Assessment	Invest in a behavioral assessment software piece to add to recruiting process. This will help identify good candidates that fit company culture and align with company values early on.
Product	Expansion	Expand our footprint - Add new destinations regionally



**Reactive: Picked by Urgency**

**Proactive: Picked by Impact**

# Financials

- Do you have your financials built out through 2025?
- What KPIs do you need to establish for growth and margin optimization?
- Are you building out forecasting tools to help you make key hiring/expansion decisions while understanding how much cash you need?

# Sales

- Who is your ideal client post covid?
- Do you have a clear sales funnel based on those clients?
- Do you have the right sales team, training, and direction to shift forward?

# Marketing

- Have you built a re-formulated marketing plan?
- Have you clearly defined your product and created the right messaging / storytelling?
- What media channels are cost-effective and deliver strong ROI?
- What needs to happen to increase your website conversion?



# Leadership

- How are you supporting your team to take more ownership and drive decisions?
- Are they feeling appreciated and valued?
- Do you have a clear org chart and well defined roles and individual KPIs?
- What are your core values and culture you want to build?

# Recruiting

- Do you have a recruitment strategy in place including a candidate avatar? Enlightening interview questions? Insight into team culture and values?
- Are you open to flexible work environments?
- Do you have systems in place to embrace work/life balance?
- Have you built and implemented an onboarding process?

# Productivity

- Do you have an operation plan that removes bottlenecks?
- Do you have a goal of how much time you want to work in the business?
- Have you prioritized finding tech solutions to expedite processes?

# ASSESSMENT

Business Model & Growth Plan							
Financials	Last Year	This Year	Next Year	3 Years Out	4 Years Out	5 Years Out	Ranking:
Revenue (\$)							
Gross Margin (%)							
Profit (\$)							
Owners Earnings (\$)							
Cash In Bank (\$)							
Sales	Last Year	This Year	Next Year	3 Years Out	4 Years Out	5 Years Out	Ranking:
Average Transaction (\$)							
Pre Sold Revenue (\$)							
New Business (\$)							
# Transactions (#)							
Step 2 of Process (#)							
Step 1 of Process (#)							
Leads (#)							
Marketing	Last Year	This Year	Next Year	3 Years Out	4 Years Out	5 Years Out	Ranking:
Top Source 1 (#)							
Top Source 2 (#)							
Top Source 3 (#)							
Spend (\$)							
Per Lead Cost (\$)							
Per Contract Cost (\$)							

# Go Beyond Your Expectations

Cultivate is partnered with thousands of business owners. The following stats are year-over-year results for Cultivate clients that have worked with us for 12 months or more.

43%

Average Growth in Top  
Line Revenue

65%

Average Growth in  
Bottom Line Profit

Google

5.0 ★★★★★ 409



*I have worked with Cultivate Advisors for about six months now, with Mike Schields. It has been an awesome experience! He has helped us make some great connections within the tourism industry as well as dug in to every aspect of our business to find so many ways we can improve! Every session, we work on things that provide tangible results across all aspects of our company! He's an amazing advisor and I consider him an invaluable part of our team! Thanks Cultivate!*



Mary Collins



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# Andrea Ross

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**THANK YOU!**