

MORE360:

Break Out. Scale Up. Profit More.

The holistic 360° program for your MORE - sales, profit, operational excellence, freedom



PHASE 1 - 8 Weeks

Goals:

- Tie together marketing, sales, operations and finance to create one system that optimizes the quality of leads, speeds closes, creates quicker delivery of products/services with fewer problems, all with higher margins.
- An increase sales and revenue above competitive and industry trends without creating “busy work”.

Deliverables:

- Competitive analysis, market differentiation, go-to-market sales plan with key performance indicators
- Operational overview and processes mapping
- Financial measurements and formulas for tracking profitability and performance across the big 4 areas of your business
- Custom SWOT & opportunity/innovation map
- Implementation plan with detailed steps/elements needed and monitoring “how-to”s to maintain and ratchet up performance across the entire organization

Session 1: Discovery & Orientation

- Clarify business goals, pain points, and owner’s vision
- Set expectations and success metrics

Session 2: Big vs. Small Company Thinking

- Explore the mindset and practices that separate scalable companies from others
- Begin alignment assessments, report, clarity

Session 3: Marketing & Sales

- Deep dive into current marketing and sales processes
- Identify strengths, gaps, and owner involvement
- Begin mapping the customer journey and lead flow

Session 4: Operations & Finance

- Review operational processes (delivery, fulfillment, service)
- Examine financial tracking and decision-making
- Discuss communication/hand-off points between functions

Session 5: Building Your Scale-Ready Foundation

- Close the biggest process gaps and alignment opportunities
- Introduce scalable process templates and best practices

Session 6: KPIs & Measurement for Growth

- Introduction to Key Performance Indicators for each Big Four area
- Select 1–2 starting KPIs per function
- Discuss simple tools for tracking and accountability

Session 7: Hands-On SWOT & Opportunity Analysis

- Identify “hidden” opportunities for profit, growth
- Prioritize the top 2–3 action areas

Session 8: Review, Roadmap, & Next Steps

- Review deliverables: completed SWOT, KPI dashboard, process maps
- Present written summary and recommendations
- Discuss go/no-go for deeper engagement (Phase 2)
- Q&A and wrap-up