



The Initiator

Vision

The Compass

Coaching	Community	Content
Goal <3 months	Goal <3 months	Goal <3 months
Mission 6-12 months	Mission 6-12 months	Mission 6-12 months
Dream 1-5 years	Dream 1-5 years	Dream 1-5 years

The Power Journal

In 12 months time ...		
We are going to ...	Because ...	And not by

Setting the Bar

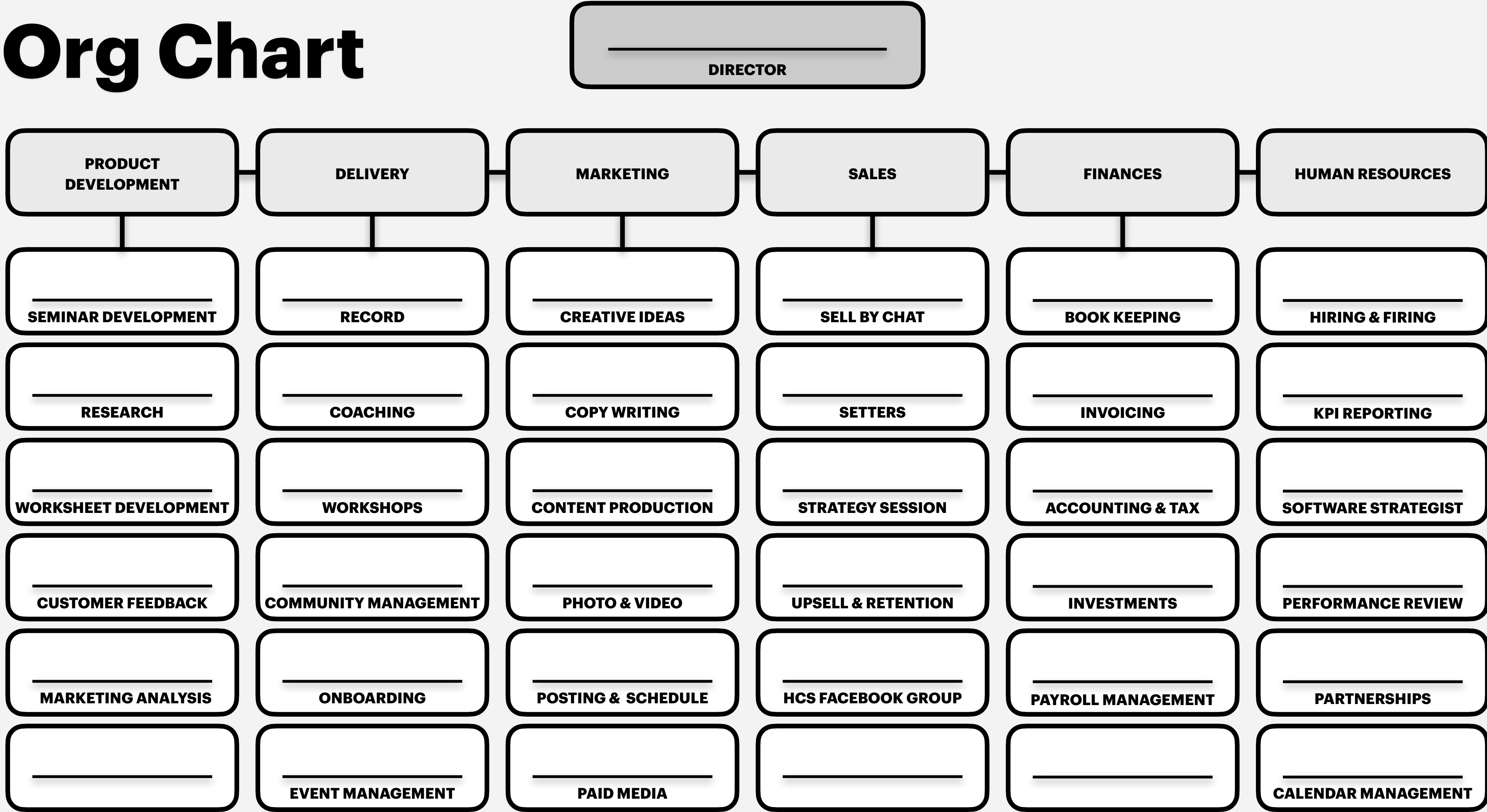
Brand standards		
We stand for ...	We aspire to be ...	We communicate ...
We pride ourselves on ...	We are in the business of ...	Our main focus is ...
We don't tolerate ...	We aren't afraid to ...	We never ...

The Alchemist

WE ARE GOING TO CHANGE _____				
Marketing	Learning	Audience	Delivery	Impact
Results	Profit	Roll in business	Team	Time
Mind-set	Self-care	Keyword 1	Keyword 2	Keyword 3

Structure

Org Chart



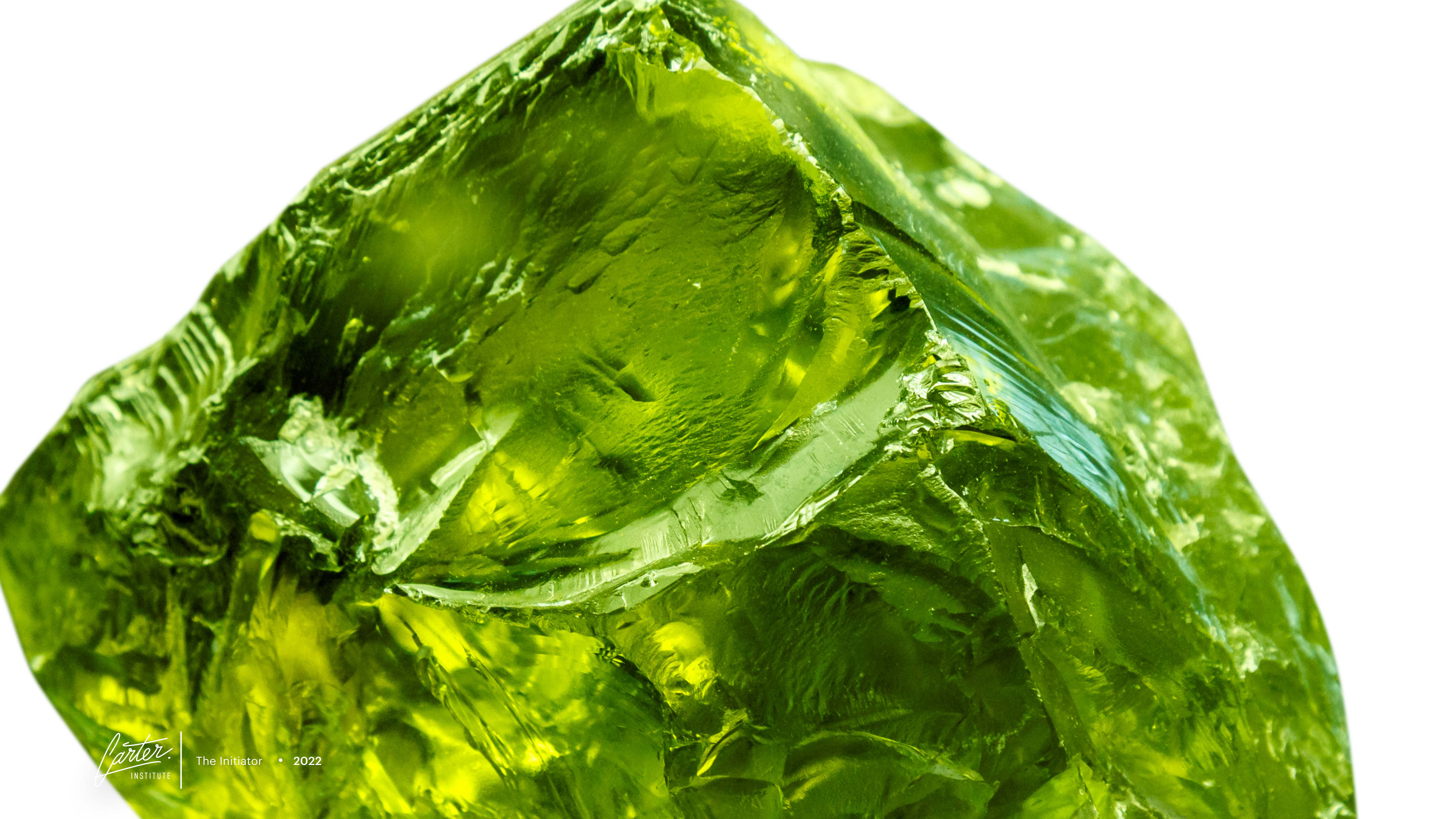


Character Map

25 step line				
Consistent	Punctual	Transparent	Trusting	Honest
Loyal	Grateful	Team player	Solutions focused	Passionate
Initiative	Committed	Self awareness	Social awareness	Professional
Selfless	Aligned vision	Hard working	Dedication	Reliable
Respectful	Integrity	Ownership	Organised	Open

Communication Cadence

How	Context	Who	When
Slack	Problem Probe	Operations Manager	Time Blocks
ClickUp	Headline	#teamchannel	Daily
Team Meeting	Bullet Points	Tech Support	Weekly
Email, Zoom, Text or Voice Message	Bottom Line	Community Support	Monthly
Weekly 1-1	Details	Founder Support	Quarterly



Kryptonite

I hate ...	Looks like	Sounds like	Damage
Un-resourceful problem finding			
Being reliably unreliable			
Hiding under rocks			
Lazy box tickers			
Low standards			



zoom



Calendar



GIANT

Boards



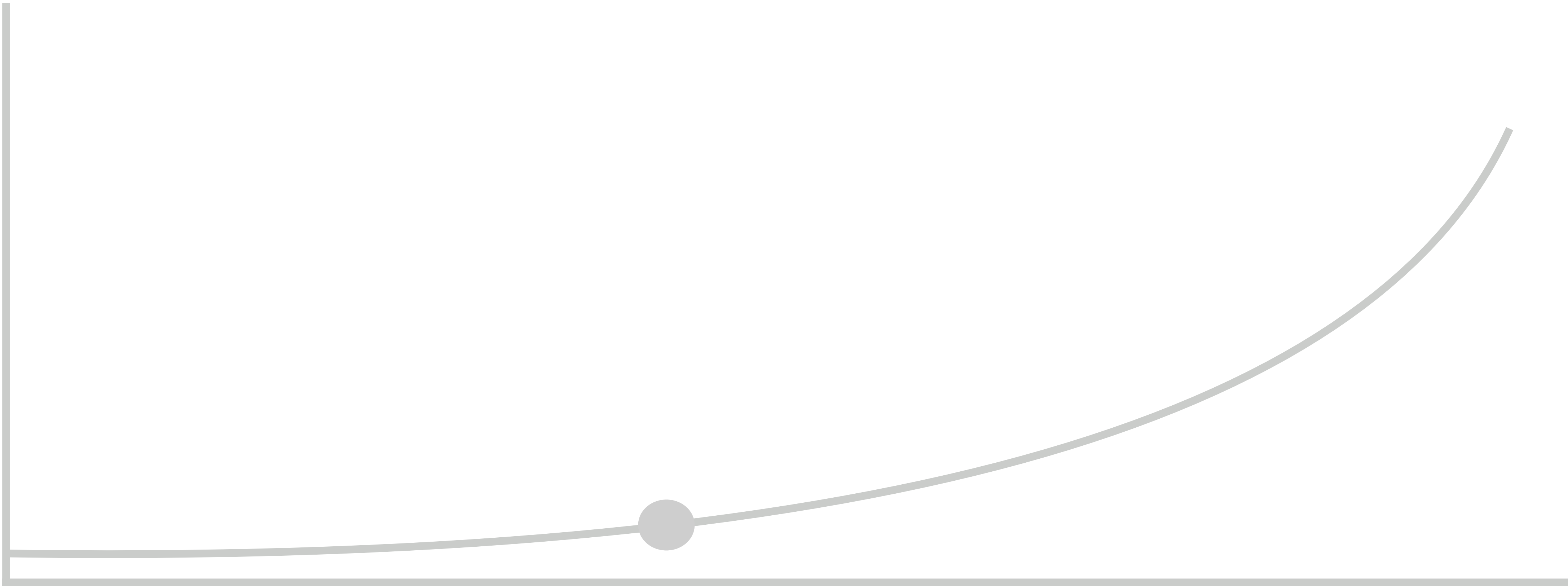
ClickUp



databox



Just Around The Corner



The Fundamentals

Topic	Got it	Know it	Mastered it
Brochure			
Sales			
Onboarding			
Coaching			
Community			

Landing Leads

Cracking conversions	
What lead generation methods were used? (Including referrals)	Objections
Sign up	Churn rate
Show up	Current number of clients
Pay up	Average client yield
Conversion rate	LTV

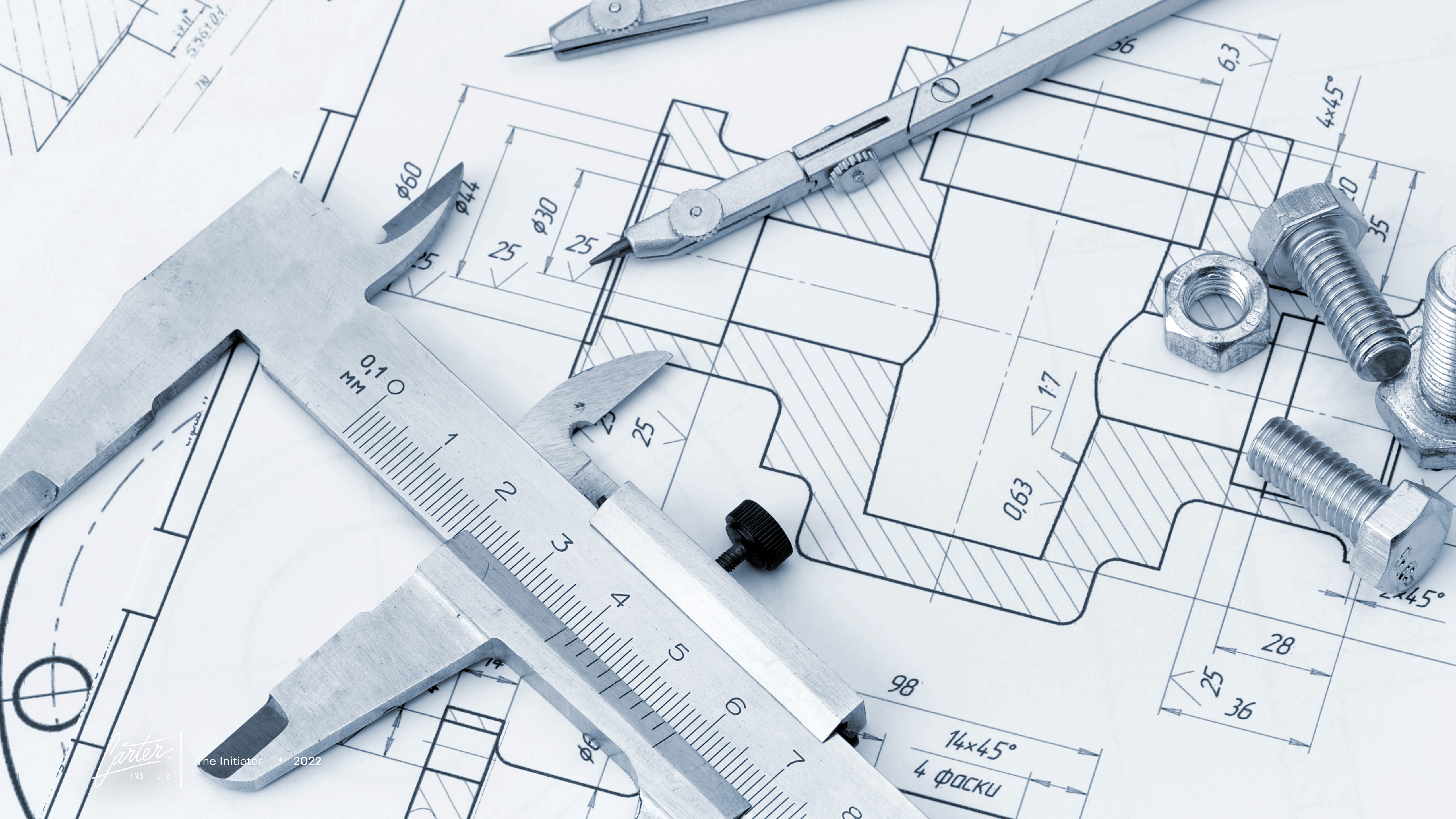


Leadership Support

Probe		Onboard		Reward	
Authority positioning	\$NA	Authority positioning	\$NA	Authority positioning	\$NA
On-going Coaching		On-going Coaching		On-going Coaching	
Weekly 1-1 with Owner		Weekly 1-1 with Owner		Weekly 1-1 with Owner	
		Base Salary*		Base Salary*	
				Carter Institute Access	\$1,500 PM
TOTAL PER MONTH		TOTAL PER MONTH		TOTAL PER MONTH	
TOTAL PER YEAR		TOTAL PER YEAR		TOTAL PER YEAR	

Bonus Scheme

Monthly KPI	Bonus	Year Track Record
Monthly		
Quarterly		



Q4 2022	[NAME]		
Category	October	November	December
Attract			
Convert			
Deliver			
Scale			
Culture			



Q1 2023	[NAME]		
Category	January	February	March
Attract			
Convert			
Deliver			
Scale			
Culture			

Q2 2023	[NAME]		
Category	April	May	June
Attract			
Convert			
Deliver			
Scale			
Culture			

Q3 2023	[NAME]		
Category	July	August	September
Attract			
Convert			
Deliver			
Scale			
Culture			



Q4 2023	[NAME]		
Category	October	November	December
Attract			
Convert			
Deliver			
Scale			
Culture			



Parter.
INSTITUTE