

inVantage

YOUR BUSINESS AND TEAM – THE WAY YOU ALWAYS IMAGINED

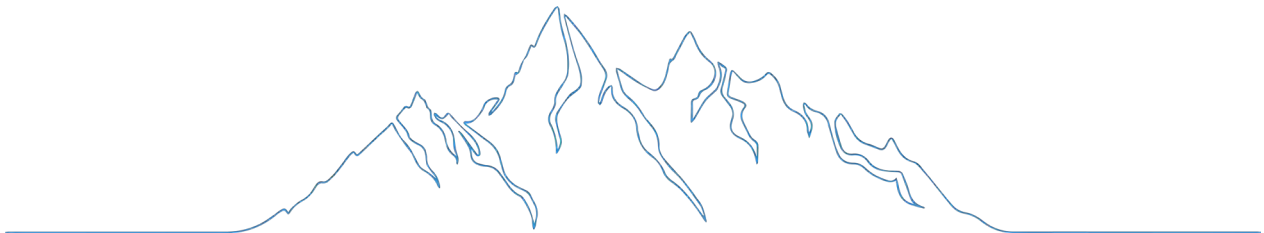
***The best views come after
the hardest climbs.***

About inVantage

We create the learning environment, bring time-proven tools, and in-the-seat-experience to business owners and leaders to live the benefits of delivering on their vision. There is no secret that running a strong business requires scalable organizational systems run by leadership teams that work in harmony with transparency, accountability, and results.

Better Business + Better Team = Better Life

inVantage was developed by experienced business owners who understand the challenges of “making it all fit together.” We work with you to strengthen your business – your overall vision, operations, and talent. As trusted business guides, we bring the right tools and methods to businesses so you not only grow, but thrive.



BUILDING A BETTER BUSINESS

Your Business and Team – The Way You Always Imagined.

Climbing a mountain may be the ultimate metaphor for business growth. We also know the best leaders didn't fall on top of their mountain – *it was a climb*.

This journey is about going somewhere that few others have gone in your industry. It is about becoming a company people talk about and want to be a part of. It is about overcoming obstacles and doing what people said cannot be done. It is making the hard decisions. It is about *enjoying the journey* and your team more.

Having a clearly defined strategy is essential. A trusted Guide is also essential – someone who can help to ensure you have a route mapped, packed the right tools, assembled the best team, and know what pitfalls to avoid along the way. If your goal is to *get to the summit*, you will need to travel light so you are agile and responsive – but still ready for any storm that is inevitably going to come along the way.

Implementing a Business Operating System (BOS) involves committing to personal and team growth with a focus on leadership. Successful individuals have a growth mindset and aim to enhance their performance continually. They're up for the hard work to become *more*.

Why Leaders Call Us

1. Need and desire to grow; break through a ceiling because things that once worked are no longer working like they used to or should.
2. Strengthen leadership team cohesion and sharpen business acumen and skills.
3. Want to be in a "Category of One" in their industry; want to do something special and charter new territory.
4. Even if things are going well, they are 100% convinced there is a next level for them and want help to get there.
5. It just isn't fun anymore - working too hard or too much for the return on investments of time, effort, and resources.



Your journey with us starts at Base Camp where we begin assembling your foundational business playbooks using timeless and proven operational and people tools. After Base Camp, we move into a quarterly session rhythm and monthly coaching program.



We also ensure you have a cohesive team working toward a shared vision, with shared language and clear objectives. After all, you can't run plays if everyone is on a different version. We bring the framework and tools to effectively implement your playbooks.



As certified Business Guides, we bring deep experience to your team. We have been in the seats your team is in and scaled our own mountains. With us, we bring the practical time-tested tools needed to get you to your own summit.

THE BOS PLAYBOOK

Our Toolkit



inVantage

Pinnacle Model



SCALING UP
CERTIFIED COACH



Running your company with a BOS is creating a commitment to level-up. This comes with the leadership team getting really comfortable with living a culture of accountability. Performance and outcomes become highly visible, thus driving incredible clarity and results. We have invested in the best tools available, including building our own proprietary playbooks.

The Right Guide

Rope in with the right Guide to help you and your team find the best path, gear, and tools for your unique journey to the Summit.

The Right Team

Get the right team in place, with the right training and conditioning to make the climb through all the changing conditions.

The Right Plan

Start the next phase of your journey to the summit with a clear and custom-tailored plan (we call them playbooks), a detailed trail map, and clear measurables to track your progress.

Journey Preparation

Before our first session, we gather key details about you and your business to prepare. Your inVantage Guide will assist you in mastering the tools you'll learn and use.

Base Camp Sessions

We establish our initial year plan with foundational full-day sessions. In Base Camp, the first set of playbooks is created.

The Right WHO

Ensure success by having the right people in the right roles, understanding leadership styles, defining company culture, simplifying organizational structure, setting clear accountability measures, and assessing talent organization-wide.

The Aligned and Clear WHY and WHAT

Establish a shared vision defining your purpose, identity, direction, and market presence. Successful organizations embrace their identity and create a compelling yet realistic path to success, supported by disciplined and focused actions.

The High-Performing HOW

Establish a structured rhythm in your business to improve forecasting and scalability. Focus on consistent actions, financial health, communication, and decision making for measurable outcomes.

INVANTAGE ASCEND PROGRAM

Guided Program to Accelerate Growth

Designed for businesses in the “sweet spot” of needing to scale or break through a growth ceiling, the inVantage Ascend Program supports ambitious leaders in accelerating their smaller-yet-ascending entrepreneurial companies, enabling them to focus on long-term goals, fiscal health and planning, market positioning, sales success, and resource alignment for sustainable growth.

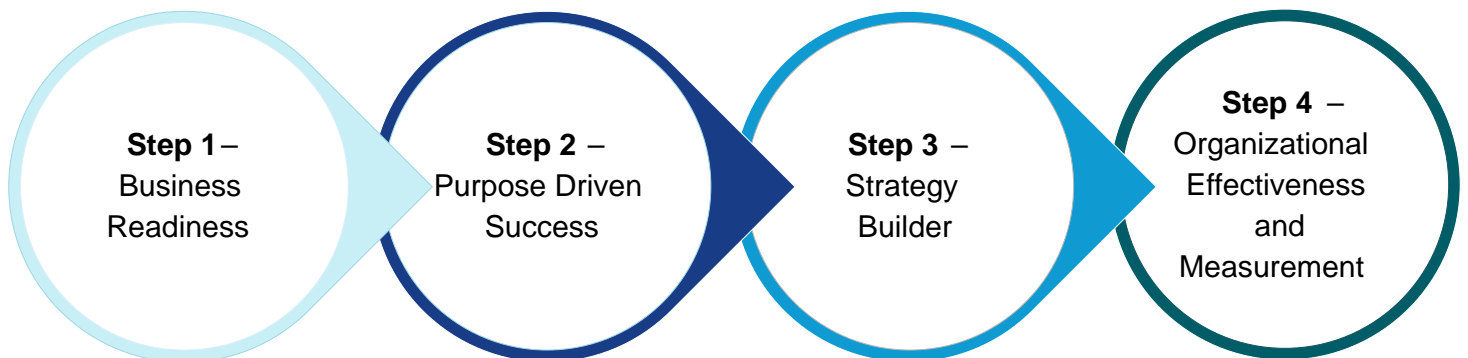
inVantage Ascend Program Benefits

- Program facilitation by an experienced Business Guide.
- Access to proprietary operating system principles and tools.
- Monthly learning sessions for issue processing and learning key business tools.
- Office hours with the inVantage team.
- Sessions held virtually or at the inVantage office.
- Invitations to exclusive inVantage webinars and events.
- Promotion and recognition in inVantage social media.
- Access to other inVantage clients for shared learning and networking.

Process and Cadence

In this guided 12-month program, an inVantage Business Guide will meet with you for an initial discussion around your goals and objectives for the program. From there you will meet over the course of 12 months to process Key Business Issues (KBIs) along with mastering fundamental business operating tools focused on key principles of a business operating system. These include setting a compelling vision, key scaling concepts and tools, performance plans, sales execution fundamentals, and financial management practices, all helping you build a strong, financially healthy, and personally rewarding business. We follow a monthly session cadence around quarterly themes.

- Monthly 1:1s with a Business Guide: Focus on KBI processing and quarterly tools.
- Monthly Office Hours: Guide availability to debrief implementation successes.
- Group Learning Sessions: Key tools and business practices shared in a large group format.



PLAYBOOK ACCOUNTABILITY PROGRAM

A playbook is a strategic approach to your unique business processes. The problem within every organization is that everyone on the team has their own way of performing common tasks, and none of these methods have been standardized. Playbooks create consistency and increase enterprise value.

The Program

An experienced inVantage Playbook Guide facilitates playbook sessions with your team. In these sessions, the team will learn how to define a playbook, identify plays, use process mapping methodology, create documentation, and establish a playbook project plan for rollout to stakeholders. The Guide will help the team complete 1-2 playbooks and execute a Project Plan using the FAST Rock methodology. The Guide will serve as an accountability partner and resource for the Project Team for 12 weeks.

“A Playbook turns chaos into clarity.”

Verne Harnish, Scaling Up Founder

Why Businesses Need Playbooks

Unburden Yourself

Getting the business details out of your head and into a sharable form.

Enhance the Employee Experience

Adds focus to Orienting, Sharing Skills, Creating Backups, and Building in Alignment.

Establish Consistent High Standards

Guard against things getting out of hand as your business grows.

Generate a Valuable Asset

Scalability is the ability to create predictable outcomes and consistent results as a foundation for growth. If your business can't operate consistently, or is unable to function without your regular direction, its value is diminished.

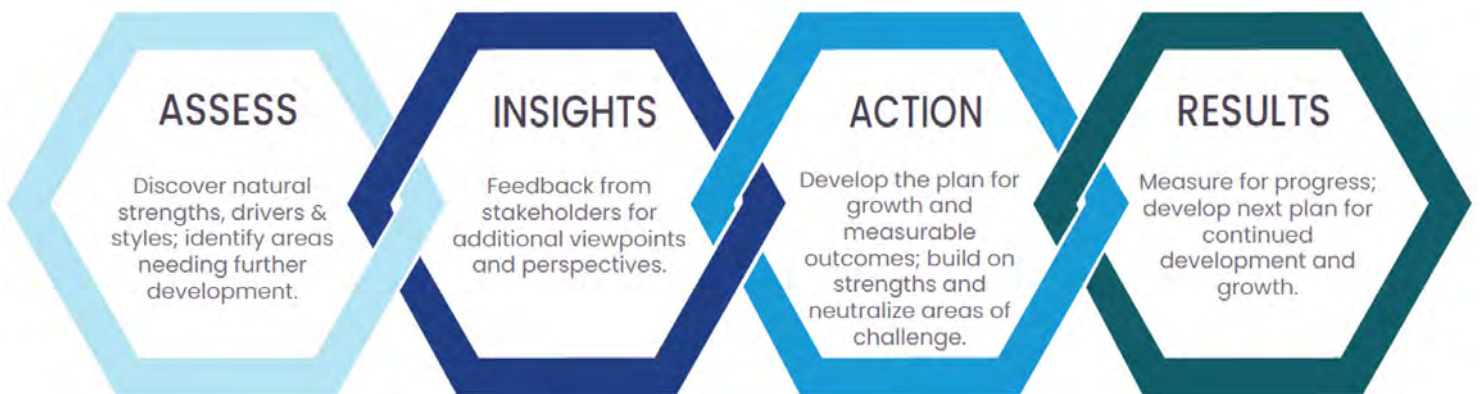
The Model



EXECUTIVE & LEADERSHIP COACHING

*The best leaders didn't fall on top of their mountain.
It was a climb.*

Coaching for executives focuses on improving relationships, effectiveness, and results through feedback and guidance. Various programs cater to individual and team development, including integration coaching for new leaders. We offer six- and 12-month programs for individuals and teams.



inVantage Coaching Framework

Studies show coaching is most effective for developing executives. Cohesive teams with strong leaders go further and faster together.

Business coaching for executives is a 1:1 or a team program designed to enhance your leaders' relationships, effectiveness, accountability, and results. By focusing on unique abilities, our coaching helps leaders become their best, contributing to better business outcomes.

Our six- and 12-month programs combine the art and science of a leader's development, using tools and data to support both the leaders' and teams' goals. We enhance individual performance and measure progress through objective feedback, unique assessments, and a goal-based development plan approach.

Our Assessments

