

inVantage Overview

Our Purpose: 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.

inVantage was developed by experienced business owners and leaders who understand the challenges of “making it all fit together”. We work with Clients where their business needs help getting stronger.

We do this through a structured, yet uniquely tailored, rhythm of full day working sessions and 1:1 coaching focused on improving business acumen of the leadership team and increasing business value.

Our clients are the boards of directors, CEO’s, business owners, and leadership teams of closely held or PE owned small and mid-market organizations that place the highest value on talent and performance, with a strong desire to level-up and grow.

Our Core Values: Our Core Values provide guidance for how we behave and conduct ourselves and our business. They are the shared demonstrated behaviors of our culture and quality.

1. Benevolent Connectors of People - Great people need other great people. Our network is large and meant to create meaningful connections.
2. Live Fully and Tackle the Climb - If you don't try, you can't fail. But you also can't succeed.
3. Say It, Do It - Credibility and confidence that we will get it done. Done done.
4. Abundance Minded - We share our resources, experience, wisdom and networks freely.

Ideal Business Guide Profile. These are the characteristics and experiences of the ideal inVantage Business Guide. The more of these a Guide meets, the better they will likely perform in the role.

Demographic	Psychographic	Experience	Geographic
<ul style="list-style-type: none"> •10+ years from retirement •Enough “in the seat” years to have seen a thing or two •Educated •Financially secure enough to become a Guide and get through the ramp up first year •Has a defined personal leadership brand/style – secure in who they are 	<ul style="list-style-type: none"> •Incredibly curious; always learning •Does not want to be a consultant; wants to guide/coach •Desires to create a brand; had built a connector network •Sees talent as a differentiator •Thinks on their feet •Resourceful; can process information and teach/facilitate it quickly •Wants to be part of a team, willing to contribute to the greater good; embracing and honoring the inVantage brand and playbooks 	<ul style="list-style-type: none"> •CEO/COO/CFO in the seat experience •Has had both wins and losses in business •Exited a business •Facilitator •Public speaking •PE experience a plus •Former BOS experience a plus (EOS, Pinnacle, Scaling Up, etc.) •Demonstrated ability to sell/build business/bus dev themselves •Vistage/YPO/EA experience as a member or facilitator a plus •Technically adept/AI tools, SaaS 	<ul style="list-style-type: none"> •Will be focused on regional growth mostly •Wisconsin •Illinois (Chicago preferred) •Willing to travel to out of state clients (Kelly trying not to...)

1. A Business Guide brings experience and credibility to the table:
 - Ideally has been a business owner, CEO and/or COO.
 - Has sat in a C-Suite capacity as a direct report to the CEO.
 - Led business strategy development and initiatives; ideally possesses M&A experience. Has written a strategic plan with clear execution path, deliverables, outcomes and metrics/KPI’s for the plan.
 - Have had P&L accountability with a deep understanding of financials and operational performance of businesses.

- Understanding of assessment tools and platforms for selection processes and development.
 - Formal public speaking experience.
 - Executive coaching experience and/or certifications a plus.
 - A background or experience with M&A (buy and sell side) is desired.
 - A business operating system certification is required (e.g. Pinnacle or Scaling Up).
2. Must demonstrate inVantage Core Values.
 3. With laser-focus, executes the goals established. Possess an entrepreneurial spirit as a Contractor for inVantage and desires to grow both our business and their business.
 4. Conducts business development activities effectively. Responsible for revenue goal attainment and meeting revenue objectives. Must be able to identify and close new business independently.
 5. Is able to effectively facilitate client sessions of all types, and possess the acumen to use all tools in the inVantage and business operating system tool kits. Follows the inVantage processes.
 6. Embraces AI as a way to do business.
 7. Maintains the integrity and reputation of inVantage by following the established processes, tools, and approaches provided.
 8. Able to contribute actively to the development of new tools and programs as needed, all within the quality expectations of inVantage.
 9. Positively contributes to the business overall; seeks opportunities for growth and shares ideas for continuous improvement and growth of the business. Develops strong collaborative relationships with other team members and those who are partners, vendors or other supporters of inVantage.

10. Participates in some business cadences, such as meetings, planning sessions, events, etc.
11. Communicates effectively in and outside the business. Resolves issues effectively - seeing real problems, being comfortable with conflict, calling out the problems, and solving the problems in a practical and healthy manner
12. Fosters an environment of zero-tolerance for office politics; demonstrates trustworthy behaviors at all times operating with the "greater good" mentality.

Other Role Notes:

1. Positions will be generally based in Wisconsin or Chicago, but may be in other locations with agreement.
2. Must be able to travel as needed anywhere a client needs them.
3. Education: Bachelors required. Masters in related field preferred. Certifications in business operating system required, talent management, HR, coaching and/or assessments a plus.
4. Demonstrated desire to continue education and learning for professional growth. Willing to secure additional certifications and learning to serve the organization and clients better.
5. Must be set up as an LLC or S Corp and able to sign the inVantage Business Guide Agreement as a 1099 contractor.