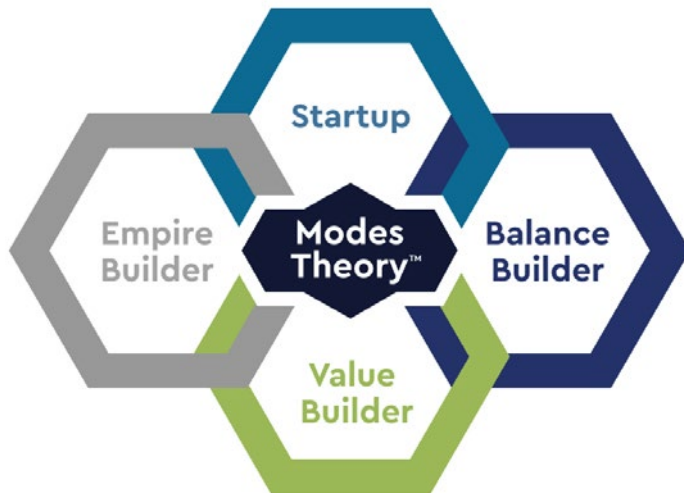


PARTNER JOURNEY POWERED BY MODES



What is a Mode?

A Mode is the success outcome you are looking for. The Mode combines how you define success, manage your service delivery offerings, lead your teams, build systems, and develop partnerships. A Mode reflects a way of business thinking and acting. It's qualitative, quantitative, and more than an unchanging label. Company owners change Modes over time and experience different needs. Modes are not determined solely by maturity or size. Instead, different Modes exhibit different maturities (OMLs) across the range of business performance.

What are the Modes?

1. **Startup Mode:** The Startup travels the journey from beginning until you reach a point which defines what you want your company to become. There are several small steps to take along the way, but you are moving from the accidental or intentional entrepreneur to creating a business and putting in place the necessary people, processes, and outcomes that allow you to begin to consider what your long-term growth perspective and desired outcome really is.
2. **Balance Builder Mode:** The Balance Builder is the type of company that wants success but chooses not to trade the owners' personal lifestyle to achieve financial success as a

priority. The Balance Builder is about finding the right clients at the right level of profitability so they can manage the business in a way so it will drive their personal desire for lifestyle, family and all things they value as important. Owners are willing to manage and balance the business, so they have success in both areas and not trading one for the other.

3. **Value Builder Mode:** The Value Builder is focused on creating consistent increases in value over time. It is growth-based but is run with profitability in mind. A focused commitment to intentionality about creating that consistent up-and-to the right value proposition.
4. **Empire Builder Mode:** The Empire Builder is about putting the Value Builder on steroids. The Empire Builder is about exponential hockey-stick growth. It is trading time and resources today with the intent of a window for giving up control to get somewhere fast and take advantage of opportunity. It requires funding, commitment, and following a plan. It takes disciplined leadership. Much of Empire Builder is driven by ego and the desire to win in the marketplace.

Foundational Questions

1. **What is your destination?** What is the mission you're on? What does the endpoint look like?
2. **How will you get there?** What is the journey to making your vision a reality?
3. **When will you get there?** What are your milestones and time horizon?

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MODE MINDSET™ PROFILES

CHARACTERISTIC	STARTUP	BALANCE BUILDER	VALUE BUILDER	EMPIRE BUILDER
High Level				
Purpose	Start something	Support their lifestyle	Consistent growth	Exponential growth
Life Focus	Live to work	Work to live	Work to build value (and increase income year over year)	Optimize enterprise value – shareholders and stakeholders
Time	Consumed	Freedom	Busy	Focused
Business Atmosphere	Chaos	Status quo	Structured improvement	Rapid change
Worry/Risk	Something happens to owner	Interruption in spinning off cash	Missing growth targets (losing clients and/or key staff)	M&A or stretch targets aren't hit
Money				
Money	Tight	Consistent	Building	Required to continue
Finance	Personal, friends and family	Personal/company debt	Company debt	Outside Investors
Budget	None	Personal only	One year view at best	Detailed and multi-year
Profitability	Minimal	Lifestyle driven	Steady improvement toward BIC	Driving to high profit
Valuation	Minimal	Low	Medium	High
People				
Family	Ignored	Priority	Partial focus	Paused
Operator	Founder	Founder(s)	Founders/Team	Mostly external team that includes investors, board, managing partners, etc.
Customer Relationships	Starting	Deep and static	Increasing	Evolving
Culture	Undefined	Lifestyle	Developing	Structured
Accountability	Inconsistent	Loose	Expected	Enforced
Sales/Marketing				
Sales Approach	Technically led	Principal led	Trying to implement	Sales led
Business Model	Sell anything people will pay for	Sell high margin opportunities	Standards and process	Repeatable and scalable
Source of New Business	Friends, friends, and neighbors	Referrals	Referrals and marketing	Disciplined marketing and vendors
Marketing Investment	Sporadic	Minimal	Growing	Significant
Future				
Growth	Elusive	Controlled	Planned	Strategic and focused
Timeline Until Transition	Long	Long	Medium	Short
M&A	Wishful thinking	Little interest	Opportunistic	Strategic plan
Change	Resist	Small changes	Want to improve towards BIC	Drive rapid and radical change
Scalability	None	Not a focus	Beginning to focus	Focal point
Planning	Limited	Tied to lifestyle	Consistent but limited accountability	Disciplined