



8 – 10 Dec, 2020
DALLAS, TX

SCALING UP Master Class

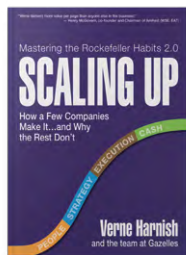
More
MONEY

More
TIME

More
FUN

Are you a leader of a growing mid-market firm?
Join Verne Harnish and his experienced team for 2.5 days of executive education.

The Scaling Up Performance Platform has helped the leadership teams of over 70,000 scaleups through a set of tools/techniques that address the 4 decisions in scaling a business: People, Strategy, Execution, and Cash – based on the book *Scaling Up: How a Few Companies Make It...and the Rest Don't* with almost a half-million copies in print across 17 languages.



This multi award-winning global master class originally offered to YPO exclusively has been honed over two-decades and offers scaleups a complete solution – **a combination of assessments, learning, coaching, and software to help you manage the chaos that comes with scale.** It's a highly interactive workshop with teams seated at round- tables to facilitate discussions and decision-making.

What we'll cover:

- PEOPLE** – Recruitment, onboarding, coaching & culture: Designing the employee journey.
- STRATEGY** – Purpose, core customer, brand promise & Identifying the company culture.
- EXECUTION** –Systems, processes & accountability through current technologies.
- CASH** –Cash flow, margins, key performance indicators, efficiencies.

Who this workshop is for:

- Leadership teams new to Scaling Up who want to get a significant jump-start in implementing the tools and techniques.
- Experienced leadership teams desiring to review, fine-tune, and advance their implementation of Scaling Up.
- CEOs with new team members they want to get up-to-speed and spend quality time integrating onto the team.
- CEOs looking to strengthen relationships with the leadership of customers/key suppliers.
- CEOs who want to run their companies like a professional sports team, not a family.

Voted the “Best Business Educational Event” in YPO



... and hosted in over 40 other cities worldwide

FAST FACTS:

LOCATION:

The Sheraton, Dallas (N. Olive St)
\$169/night
Call +1 214-922-8000 and mention Scaling Up to book this group rate

DATES:

Dec 7, CEO Pre-Session: 7pm-10pm
Dec 8-9, DAYS 1-2: 9:30am-10pm
Dec 10, DAY 3: 10am-1pm;
Optional 2:30pm-4pm

AUDIENCE:

Executive leadership
(teams & individuals)

COST:

1-2 Execs: \$995/seat
Team of 3: \$2495 (\$795/additional seat)
Team of 8: \$4995 (\$595/additional seat)

* Returning CEOs, bring one new paying attendee each year to attend for free

INCLUDED:

- All course materials, lunches and snacks
- For teams of 3+, 2 online team assessment tools to be completed prior to arrival

EXCLUDED:

Travel and accommodations

SEATING:

In order to meet social distancing requirements, we are limiting 80 teams max to attend.

Email Mike@scalingup.com
to register today!

WHAT'S YOUR MINDSET ON GROWTH?






The Master Class Workshop isn't for everyone.

We believe you must have one of two mindsets to fully benefit from attending:

1. If you're frustrated knowing that your business could be better in many ways, but you keep running into obstacles with every attempt to improve, then this workshop is for you.
2. If you're passionate about and committed to growing your business in new and unpredictable ways, then this workshop is for you.

Take the quick test created by Dan Sullivan below to see where you fall!

See page 3 to find where you fall on the Scaling Up Scorecard.

Mindsets	1	2	3	4	5	6	7	8	9	10	11	22	Scores			
The optimum mindsets of those individuals who most maximize what you create in the marketplace.	Failure			Frustration			Conventional Success			Transformative			Goals			
	Feel sorry for themselves			Don't know how to help themselves			Don't know there's anything better			Always making themselves better			← 12			
																← 12
The Optimum Maximizer enables you to transform every area of your decision-making, communication, positioning, and marketing. You can bring the Optimum Maximizer into your daily activities through a Mindset Scorecard, which consists of eight mindsets developed through four columns of "scoring statements." Depending on how individuals reading your Scorecard evaluate themselves, they will choose one of the four columns for each mindset and then choose one of the three numbers in that column based on where their own mindset falls in relation to a best possible score of 12.	Individuals who feel sorry for themselves are failures to interact with because they habitually see themselves as victims of their circumstances.			Individuals in this column know that their lives could be better in many ways, but they keep running into obstacles with every attempt to improve themselves.			These individuals played by the rules, got to the top of other people's ladders, and see that all of the uncertainty and hard work of their careers is in the past.			These individuals are passionate about and committed to always growing in new and unpredictable ways. They seek things that are new, better, and different.			← 12			
	<ul style="list-style-type: none"> • Unfairness: They feel that other people have unfair advantages that enable them to do things faster, easier, and cheaper and achieve bigger rewards. 			<ul style="list-style-type: none"> • Painful: They have become painfully aware of an increasing number of areas in their lives where they are not growing or succeeding. 			<ul style="list-style-type: none"> • Status: They feel that they have earned the right to be admired and to be recognized as having arrived at the top of their field and specialty. 			<ul style="list-style-type: none"> • Self-Improving: They are motivated increasingly by their own internally-generated purpose, standards, and goals – all leading to transformative growth. 			← 12			
	<ul style="list-style-type: none"> • Reactivity: Everything in the world is changing in so many ways that life is hopelessly complicated and confusing. 			<ul style="list-style-type: none"> • Deficient: They want to make a big jump, but they lack the practical vision, discipline, structure, and process to stick with anything for very long. 			<ul style="list-style-type: none"> • Lifestyle: At this point, their biggest goals and rewards, and most motivating activities, lie outside of their work, in the area of lifestyle. 			<ul style="list-style-type: none"> • Expansive: They continually measure their progress by increasing capability, creativity, credibility, connections, confidence, and cash. Everything gets better. 			← 12			
	<ul style="list-style-type: none"> • Blame: They feel that outside factors are totally in control of the future and that these are to blame for their failures. 			<ul style="list-style-type: none"> • Anxious: They feel increasingly anxious that they woke up too late, wasted too much time, and will never catch up. 			<ul style="list-style-type: none"> • Incremental: They still desire business and personal progress but don't believe anything dramatic is possible. 			<ul style="list-style-type: none"> • Abundance: They love helping others transform themselves and are committed to making every "pie" much bigger. 			← 12			
													← 12			

WHO you're looking for is actually YOU.

SCALING UP SCORECARD



Are you transforming your company's responsive ability to continually expand itself?

Further looking at our 10 Rockefeller Habits, which words and phrases resonate with you?

Take the quick test created by Dan Sullivan below to see where you fall! If you score 4-6 or 10-12, we'll be of great service to you. If you score 1-3 or 7-9, we don't recommend our Master Class.

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12	Score A	Score B
1 Healthy And Aligned	You're always disappointed with the attitudes and behavior of the majority of your employees. Where are the good people?			You have key employees who totally "get it" and others who don't, but you don't know how to increase the number who do.			Your company is staffed with individuals who know their jobs and reasonable company growth is guaranteed.			You've developed your employees so that they always feel knowledgeable, aligned, engaged, and valuable.				
2 Number One Accomplishment	You're so overwhelmed with cash flow uncertainty that the biggest quarterly accomplishment is just being in business.			You do your best to keep everyone up-to-date with the most important objectives, but you wish it could be more systematic.			You've built your company to work like a machine that only needs regular maintenance to be continually profitable.			You ensure that everyone is confidently committed to the single biggest 90-day accomplishment for the whole company.				
3 Communication Rhythm	You feel increasingly isolated and anxious because you don't know how your company is operating in the marketplace.			You know that everyone in your company wants to be more clued in, but you've always been too busy to figure out how.			Your expectations for all of your employees is that they master their job descriptions and achieve performance standards.			Your communication processes continually keep everyone up-to-date, energized, and focused.				
4 Complete Personal Accountability	You are paralyzed by the thought that industry breakthroughs are making your products and operations obsolete.			You've definitely made progress in assigning capability, but you don't have a plan for making it 100% for crucial activities.			You're the one who sets goals for your company and for the most part only key managers need to know the goals.			You've trained someone to be personally accountable for achieving goals in every crucial area of organizational progress.				
5 Strategically Crucial Input	You are continually blindsided by employees who hide bad news and do the bare minimum to hold on to their jobs.			You're getting better at picking up what your employees are noticing, but you don't know how to create a process for this.			You've been in your business, marketplace, and industry for so long that there isn't very much that employees can tell you.			You're continually informed about obstacles and opportunities by employees who are creatively transforming them.				
6 Consumer Feedback Data	You know there are so many unhappy clients and customers that it's not even worth the effort to turn things around.			You totally know that feedback from your customers is crucial for staying ahead, but you don't know how to organize this.			You have regular reviews with your best customers, and unless there is a major complaint you know everything is okay.			You are always systematically improving the quality and depth of consumer feedback so that it is as timely and useful as your financial data.				
7 Core Values And Purpose	You're aware that most of the people who work for you don't even know what your company does for customers.			You know that your best people support your vision for the company, but it's not written down for everyone to know.			You have been able to build a very successful company without anything written or said about values or purpose.			Your company's culture is continually expanded out of core values and a central purpose that everyone supports.				
8 Employee Articulation	You've gone your entire career without having any strategy for your company beyond paying yourself a decent salary.			You set goals for your company and reward people when they're achieved, but you've never communicated in terms of strategy.			You find that the kind of managers and employees who work best for you don't need to know about your ambitions.			You measure your organization's capability by every employee being able to articulate the company's most ambitious strategy.				
9 Employee Quantification	You can tell just by looking at them that most of your employees only show up for work because they need the money.			You do many things to keep everyone's energy high, but you've never seen employee self-measurement as a way of doing this.			You have established performance benchmarks to bonus all of the key individuals and they always know what they are.			You increase the energetic confidence of the entire company by each employee being able to measure their good days and weeks.				
10 Visible Plans And Performance	You don't know if you'll be able to keep meeting payroll for the rest of the year -- something that you're keeping secret.			You tell the key people about company growth and achievement, but you don't use visible measurements to do this better.			You have regular get-togethers for most of the key players and, as a result, everybody knows that things are going well.			You continually inform everyone about the visible growth of the company and about the visible success of company plans.				
Scorecard														

Incorporated into the 4 decisions a leader must make are powerful growth tools and worksheets to help you scale more seamlessly. In our 2.5 days together, we will cover:

PEOPLE

- Best-Practice Hiring Techniques:
How to spot, attract and keep top talent
- How to connect with every single person in your organization
- The hottest senior position in today's growth companies
(create it, fill it, and watch everyone get smarter)
- Business Units vs. Functional Heads:
Find the perfect balance and keep customer satisfaction soaring

People Tools:

- One-Page Personal Plan (OPPP)
- Function Accountability Chart (FACe)
- Process Accountability Chart (PACe)

STRATEGY

- The weakness in most growth environments that poses the biggest threat
- Accountability – Get the right people doing the right things
- Every person in your organization must be on the same page
- KPIs: Track short-term, focused, measurable outcomes

Strategy Tools:

- SWT
- 7 Strata
- One-Page Strategic Plan
- Vision Summary

EXECUTION

- 3 Daily Huddle must-haves
(invest 15 minutes to free up a full hour)
- Weekly Meeting Checklist:
6 crucial items you can cover in 60 minutes
- Quarterly Meetings: 5 non-negotiable agenda items to align everyone with the organization's goals and priorities
- The single most powerful question to ask in Quarterly Meetings to guarantee scalable gains
- How meetings eliminate the perception of micromanagement

Execution Tools:

- Who What When (WWW) Worksheet
- Rockefeller Habits Checklist TM
- Scaling Up Scoreboard

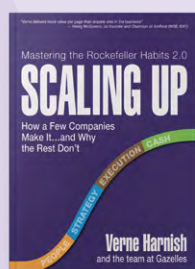
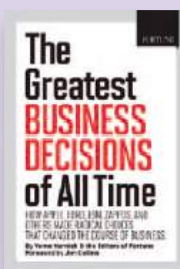
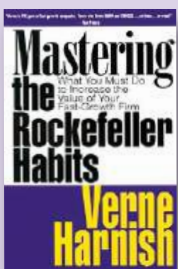
CASH

- Accountabilities vs. Processes: the difference and why you must track both
- Drilling down: The real reason to chart workflow
- Identify the numbers you must watch daily to maintain your growth trajectory

Cash Tools:

- Cash Acceleration Strategies (CASH) + Cash Conversion Cycle (CCC)
- The Power Of One

Additional Tools for Managing Growth



Ready to Scale Up?

To register Email Mike@scalingup.com

For any additional inquiries, email donna@scalingup.com

If you and your team are interested in attending, we recommend locking your reservation down soon in order to get the best seats!

THE SCALING UP ASSESSMENT AND CASH FLOW REPORTS



The Scaling Up Assessment will show you findings in comparison to your peer group. Your peer group being companies that are of a similar size and in the same organizational phase. Our understanding, however, is that almost all organizations undergo the same phases and challenges. It's usually when those challenges have been accomplished, with the right people in the right seats, implementing a clear strategy and execution design, with sufficient funds and ideal leadership that the organization is ready for further growth and Scaling Up. In this report, you will receive a score based on how you are doing with regards to your people, strategy, execution and cash. We will also compare your scores to your peers so you can see where you fall.



The Cash Flow Story and assessment created for all companies in attendance of this workshop includes 14 pages of in-depth cash assessments meant to shed light on the financial sensitivities of your business. You'll clearly be able to see profitability trends, revenue growth vs. COGS growth, revenue growth vs. overheads growth, your current working capital and your working capital trends, and more. Also included in this assessment is the "Power of One", which shows you how simple 1% and 1-day movements across just 7 aspects of the business can dramatically improve cash and profit.

YPO Past Attendee Feedback:

"The most intense and highest value for time and money training event from YPO so far. I wish we could have some of this in HBS."

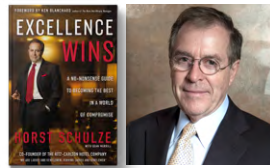
- Izi Kohen (Istanbul Chapter)



Horst Schulze – Excellence

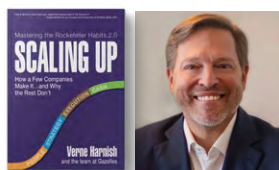
A legend and leader in the hotel world, Horst Schulze's teachings and vision have reshaped the concepts of service and hospitality across industries.

Throughout the years he worked for both Hilton Hotels and Hyatt Hotels Corporation before becoming one of the founding members of The Ritz Carlton Hotel Company in 1983. During his tenure at The Ritz Carlton, Mr. Schulze served as President and COO responsible for the \$2 billion operations worldwide. Under his leadership, The Ritz Carlton Hotel Company was awarded the prestigious Malcolm Baldrige National Quality Award- twice- making it the first and only hotel company to ever win and was continuously voted "best hotel company in the world" by meeting and other trade publications. He held customer service to the highest regard, creating the legendary Ritz motto "We are ladies and gentleman, serving ladies and gentleman" that lives on today. Horst was also recognized as "corporate hotelier of the world" by HOTELS magazine. Horst is the author of *Excellence Wins*, a book Verne named one of the best 5 business books of 2019.



Verne Harnish – Scaling Up

Verne Harnish is founder of the world-renowned Entrepreneurs' Organization (EO) and chaired for 15 years EO's premier CEO program, the "Birthing of Giants" held at MIT, a program in which he still teaches today. Founder and CEO of Scaling Up, a global executive education and coaching company with over 180 partners on six continents who have helped over 70,000 companies, Verne has spent the past three decades helping companies scaleup. He's the author of the bestseller *Mastering the Rockefeller Habits*, and along with the editors of *Fortune*, authored *The Greatest Business Decisions of All Time*. His latest book *Scaling Up (Rockefeller Habits 2.0)* has won eight major international book awards including the prestigious International Book Award for Best General Business book.



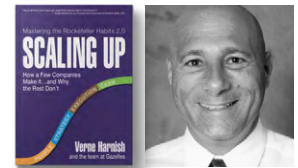
Ron Lovett – Organization/Culture

Ron Lovett founded Source Security and grew it into a national security firm employing 1500 security guards across Canada. 15 years later, he sold the company to the largest security company in North America at a 24x multiple. Now, Ron focuses on his people and culture at the company Connolly Owens, a portfolio of residential rentals in Atlantic Canada set to revolutionize affordable housing. Ron's unorthodox entrepreneurial journey is defined by relentless learning, fast action, constantly coaching your staff to reach their potential – and inspired his first book *Outrageous Empowerment* in 2018.



Alan Miltz – Cash Flow

As founder of Cash Flow Story, Alan Miltz has developed financial analysis techniques that have become a global standard for businesses, CPAs and banks. These techniques are now being used in 30 countries by over 20,000 customers including 500 leading banks. The diagnostic principles he developed are now changing the way business leaders are reviewing their financial performance. He was also one of the co-authors of the bestselling book *Scaling Up* by Verne Harnish. His concentrated business savvy has also assisted a large number of Australian companies to successfully raise debt finance from the major financial institutions to over \$1.4B to date. Alan is a previous Best Speaker in Australia for TEC, the world's largest CEO forum. He is currently of the board over 13 well-recognized Australian companies.



John Ratliff – Strategy/Culture

With over 25 years of experience as an entrepreneur, CEO and investment banker, John co-founded align5 advisors in 2013 to advise growth company entrepreneurs and family enterprises on a variety of strategic issues including sell-side and buy-side M&A. Prior to this, John was a managing director with STS Capital Partners, a boutique investment bank. John was also the President and CEO of Appletree Answers, a call center company he founded in 1995. He grew the company organically by implementing strategies from *Rockefeller Habits 2.0*, and through a series of acquisitions to 24 U.S. locations and 650 employees. John sold Appletree Answers to a strategic buyer in June 2012. In addition to growing the company's revenue and profitability, Appletree Answers had a remarkably low turnover rate of 18% versus the industry average of 110%.



David Meerman Scott – Marketing

David Meerman Scott is a marketing strategist, keynote speaker, seminar leader and author, who spotted the real-time marketing revolution in its infancy. David is the author of 10 books, including the modern business classic, *The New Rules of Marketing and PR*. His experience at the global technology companies NewsEdge Corporation and Knight-Ridder led to him being at the forefront of online marketing. Over the years, he has refined the tools and techniques needed to best communicate directly with marketplaces and has been a content marketing strategist for HubSpot, Mynd, InstaViser, YayPay and more.





Pre-Session CEOs-Only

Monday, Dec 7 | 7pm – 10pm



This important private session for CEOs is structured similarly to the opening evening of our exclusive CEO Boot Camp. Verne Harnish, John Ratliff, and Ron Lovett will cover topics both critical and unique to the top leader – CEO/Managing Director/President – of the organization.

The rest of the leadership team will join the CEO the morning of day 1 (Tuesday), affording the team the opportunity to spend a good part of Monday prepping their respective functions for the week, then arriving later Monday evening. We'll wrap up the Master Class Thursday evening, allowing most executives to get back in the office on Friday – or take an additional day/weekend to finish their strategic plan for 2021. Let us know if we can help arrange a meeting space at or near the event.

People, Strategy, Execution, Cash

We'll drill down into each of the 4 decisions as it relates to the top leadership position – starting with each CEO assessing their strengths and weaknesses. In addition, we'll detail:

- 1) The CEO role in setting strategic direction
- 2) How best to seek council – and then set up a weekly “council”
- 3) Their role in meetings and the importance of “equal talk time”
- 4) Explore the most important decision most CEOs/owners will make

CEO KPIs

We'll also look at some critical routines in which all CEOs should engage – and five measurable activities common to the successful top leaders in the world. Specifically:

- 1) How should you spend your time most effectively?
- 2) What is the top metric for the entire organization?
- 3) The one “must do” weekly routine to put everyone at ease?
- 4) The important gift you must give yourself.

Foundation for Success

The evening is also an opportunity for the CEOs to meet and connect ahead of their teams arriving. It's also an opportunity to set the foundation for a successful week. We look forward to hosting this special pre-session executive program for CEOs-only.

YPO Past Attendee Feedback:

“Extraordinarily implementation oriented; great since we could bring our teams with us; so far the best YPO seminar I have ever attended.”

– Jochen Werz (Greater Europe Chapter)

DAY ONE

Your People & Your Customers

Tuesday, Dec 8

SESSION 1 | Introduction | 9:30am – 11:30am

– Verne Harnish

#1 Question, 3 Disciplines; FAST vs SMART goals

Achieving Excellence | 11:30am – 1pm

with Horst Schulze via Zoom

As Founding President and COO of Ritz-Carlton, Horst Schulze established a new standard of excellence within his industry. He energizes organizations to reconnect with their service commitment and forever altered the very nature of customer service by creating a culture of “ladies and gentlemen serving ladies and gentlemen.” During this session, Horst will incorporate findings from his book *Excellence Wins: A No-Nonsense Guide to Becoming the Best in a World of Compromise*, which Verne named one of the top 5 Business books of 2019, to provide you with successful service-oriented strategies and precision that build and maintain lasting customer relationships.

1PM – 2:30PM | LUNCH



SESSION 2 | PEOPLE | 2:30pm – 4:00pm

– Verne Harnish

FACe and PACe tools, hiring, onboarding, engagement, and organizational structure



Guest CEO Ron Lovett (in-person) | 4:30pm – 5:30pm

– Author of *Outrageous Empowerment*

Ron will share how he scaled his firm to 1500 employees through a “team of teams” approach.



5:30PM – 7:30PM | BREAK

SESSION 3 | PEOPLE and STRATEGY | 7:30pm-9pm (or later!)

– Verne Harnish

Deeper dive for those working on/refining their Core Values and Purpose. Verne and team will stay as long as necessary to help teams work through the nuances of these foundational decisions bridging people and strategy.



“Rockefeller system delivers more value for the \$ than anyone else in the business!”

– Henry McGovern, Chairman and CEO AmRest

YPO Past Attendee Feedback:

“Event was not only thought provoking, but also giving the actual tools to transform the organization for further growth.”

– Anar V. Aligioulov (Europe One Chapter)

“Absolutely fantastic event- highly recommended it.”

– Sharen McCabe (Dublin Chapter)



DAY TWO

Strategy, Sales & Execution

Wednesday, Dec 9

SESSION 4 | STRATEGY | 10am – 1pm

– Verne Harnish



SWT, 7 Strata, One-Page Strategic Plan (OPSP), and Vision Summary tools. How to craft a strategy that dominates a niche.

1 – 2:30PM | LUNCH

Guest Author David Meerman Scott

2:30pm – 5:30pm

(via Zoom from Boston)



Author of 10 leading books on marketing including his most recent Fanocracy.

His experience at global technology companies including NewsEdge Corporation, led to him being at the forefront of online marketing. Over the years, he has refined the tools and techniques needed to best communicate directly with marketplaces and will share them with you.

5:30 – 7:30PM | BREAK

Session 5 | Execution | 7:30pm – 10pm

– Verne Harnish



Rockefeller Habits Checklist, priorities/themes, meeting rhythms.

SESSION 6 (optional) | 7:30pm-?

– Verne Harnish

Deeper dive into setting specific priorities and the formulation of your quarterly/annual themes for 2021. We'll also take a deeper dive into your specific KPIs. Again, Verne and team will stay as long as necessary to help teams work through these decisions.

Questions?

To register, email Mike@scalingup.com

For any additional inquiries,
email donna@scalingup.com

DAY THREE (Half-day with optional afternoon)

Cash and Next Steps

Thursday, Dec 10

SESSION 7 | EXECUTION and CASH | 10am – 1pm

– Verne Harnish and Alan Miltz



Back to the PACe tool to “Banish Sloppiness” through a focus on process improvement. Then a focus on the CASH and Power of One tools. Special guest Alan Miltz (via Zoom from Australia)

1 – 2:30PM | LUNCH

SESSION 8 (optional) | Next Steps | 2:30pm – 4pm

– Verne Harnish



This is time for your teams to gather to make some final decisions, complete the one-page Vision Summary, and ask questions of Verne and the team as you prepare for 2021.

SCALING UP Master Class

8–10 Dec, 2020
The Sheraton Dallas,
North Olive St.

