

WEBCAST-SCALE SUCCESS ACADEMY:

Do you dream of starting or growing a consulting business, training company, or other mission-focused business?

If so, SCALE Success Academy is the place for you.

To SCALE your business means that you invest your time to make the biggest impact in the lives of your clients and customers while maximizing your profits.

The SCALE formula is:

- S = Systemize
- C = Clone
- A = Automate
- L = Leverage
- E = Energize

This simple SCALE formula is how you can increase the reach of your business mission and enjoy the rewards of business ownership without feeling overwhelmed and “salesy.”

We’ve built this *hand-on* program to give you the tools you need and the time necessary to customize them for your unique products and services - and we incorporated both into the training process.

- Our goal is for each participant to **leave with an implementable Action Plan so that you have focus and clarity about the next steps** to SCALE your business.

Any you can **feel confident that you are ready to SCALE your business** with the tools, planning, and support you receive during the SCALE Success Academy.

-Wishing you all success!

Lucy

Lucy Morgan, CPA

Founder MyFedTrainer.com



WEBCAST-SCALE SUCCESS ACADEMY AGENDA:

FIRST SESSION (3 HOURS): 9:00-12:00 [PRE-WORK and S = Systemize]

Module One - Getting Started by Lucy Morgan CPA:

Instructor-Led Presentation(s) 9:00-10:00

Presentation by Lucy Morgan:

- Welcome and Introduction
- Product and Service Promotion Inventory
- Social Media Inventory
- Calendarpedia

Presentation by Joanne Johnson:

- Introduction
- Pixabay
- Canva

Presentation by Rebecca Selleck:

- Introduction
- Meet Edgar
- Other

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

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Module Two - Systemize Concepts by Lucy Morgan CPA:

Instructor-Led Presentation 10:00-11:00

What is SCALE?

Learn how to SCALE and SYSTEMIZE your marketing and sales efforts so that the critical business building tasks happen on time, every time.

Here's a sample of what we will cover:

- What is the SCALE process?
- TELL, SHOW, DO, REVIEW Training Method
- TELL-Why Systemize - The Benefits of Building a System
- TELL, SHOW, DO, REVIEW Method
- TELL-Where to Start- The First Steps to Using Systems that Attract Prospects and Make Sales Consistently
- SHOW-What Critical Marketing and Sales Systems Do We Use-Lessons Learned

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team.

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Module Three - Systemize Activities by Lucy Morgan CPA:

Instructor-Led Activities 11:00-12:00

- **DO-SCALE Success Plan Activity:** Identify and Plan Your Primary Marketing and Sales Systems

REVIEW

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

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Lunch 12:00-1:00

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SECOND SESSION (3 HOURS): [C = Clone]

Module Four – Clone Concepts by Lucy Morgan CPA:

Instructor-Led Presentation: 1:00-2:00

How to CLONE your business systems so that you can maximize your results while minimizing stress.

- TELL-Why Clone - The Benefits of Best Practices Templates
- TELL-What Templates We Use for Attracting Clients and Asking for Sales (in a nice way)
- TELL-Where to Start- The First Steps to Easily Cloning Your Systems for Success

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

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Module Five – Clone Demo and Bonus Presentation by Lucy Morgan CPA:

Instructor-Led Presentation(s) 2:00-3:00

Presentation by Lucy Morgan:

- SHOW-Laying Out My Calendar for Cloning

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

Presentation by Rebecca Selleck:

- Cloning with Social Media Tools

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

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Module Six – Clone Activities by Lucy Morgan CPA:

Instructor-Led Activities 3:00-4:00

- **DO-SCALE Success Plan Activity:** Clone Templates to Fill Your Marketing and Sales Calendar and Content Library

REVIEW

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers, and clarification from the SCALE Team.

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THIRD SESSION (3 HOURS): [A = Automate]

Module Seven – Automate Concepts by Lucy Morgan CPA:

Instructor-Led Presentation(s) 9:00-10:00

How to AUTOMATE the things that suck up precious minutes and hours out of your time each day and delegate the things that you don't need to do personally:

- TELL-Why Automate – How the Lack of Delegation Cripples Your Business
- TELL-Where to Start- The First Steps to Freeing Your Life with Strategic Automation

- SHOW-What Systems and Tools We Use to Automate our Marketing and Sales Systems (Without Breaking the Bank)

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team.

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Module Eight – Automation Bonus Presentations by Lucy Morgan CPA:

Instructor-Led Presentation(s) 10:00-11:00

Introduction by Lucy Morgan:

- TELL-How to SCALE Faster

Presentation by Joanne Johnson:

- TELL-SCALE Faster through Team Building and Automation

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team

Presentation by Rebecca Selleck:

- TELL: Automation and delegation with social media delegation tools

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team

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Module Nine – Automation Activities by Lucy Morgan CPA:

Instructor-Led Activities 11:00-12:00

- **DO-SCALE Success Plan Activity:** Identify, Plan and Implement Areas of Automation to Deliver Dependable Results that Attract the Right People to Your Business Dependably with Less Effort

REVIEW

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team

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Lunch 12:00-1:00

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FOURTH SESSION (3 HOURS): [L = Leverage] and [E = Energize]

Module Ten - Leverage Concepts by Lucy Morgan CPA:

Instructor-Led Presentation(s) 1:00-2:00

How to LEVERAGE your time so that you get laser-focused on delivering the highest value of service to your clients and customers:

- Why Leverage – The Art and Science of How to Do Less but Help More
- What “Rules of Engagement” We Use to Leverage Our Time (And You Can Too!)
- Where to Start- The First Steps to Leveraging Your Time to Deliver the Most Results

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team

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Module Eleven – Leverage Bonus Presentation and Activities by Lucy Morgan CPA:

Instructor-Led Presentation(s) 2:00-3:00

Presentation by Joanne Johnson:

- Creating a Course That Sells

Live Chat Q & A:

- FAQ-Join in the live chat, ask questions, get answers and clarification from the SCALE Team

Instructor-Led Activity

- **SCALE Success Plan Activity:** Develop Your Own “Rules of Engagement” for Leveraging Your Time and Identify Targeted Opportunities to Provide More Value to Your Clients and Customers

REVIEW

Live Chat Q & A:

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Module Twelve – Energize Concepts and Activities by Lucy Morgan CPA:

Instructor-Led Presentation(s) 3:00-4:00

Presentation by Lucy Morgan CPA:

How to ENERGIZE your business results by eliminating the drudgery while ensuring that the critical marketing and sales function happen on purpose and on time.

- Why Energize – The True Risk and Cost of Entrepreneurial Burn-out
- What Lessons We’ve Learned Using the SCALE Principles for Marketing and Sales to Energize Our Sales and Life

- Where to Start- The First Steps to Implementing Your SCALE Success Plan

Instructor-Led Activity

- **SCALE Success Plan Activity:** Finalize Your Own Customized SCALE Success Plan and Take the First Steps to Energize Your Business and Life in the Coming Year

REVIEW AND WRAP-UP

Live Chat Q & A:

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