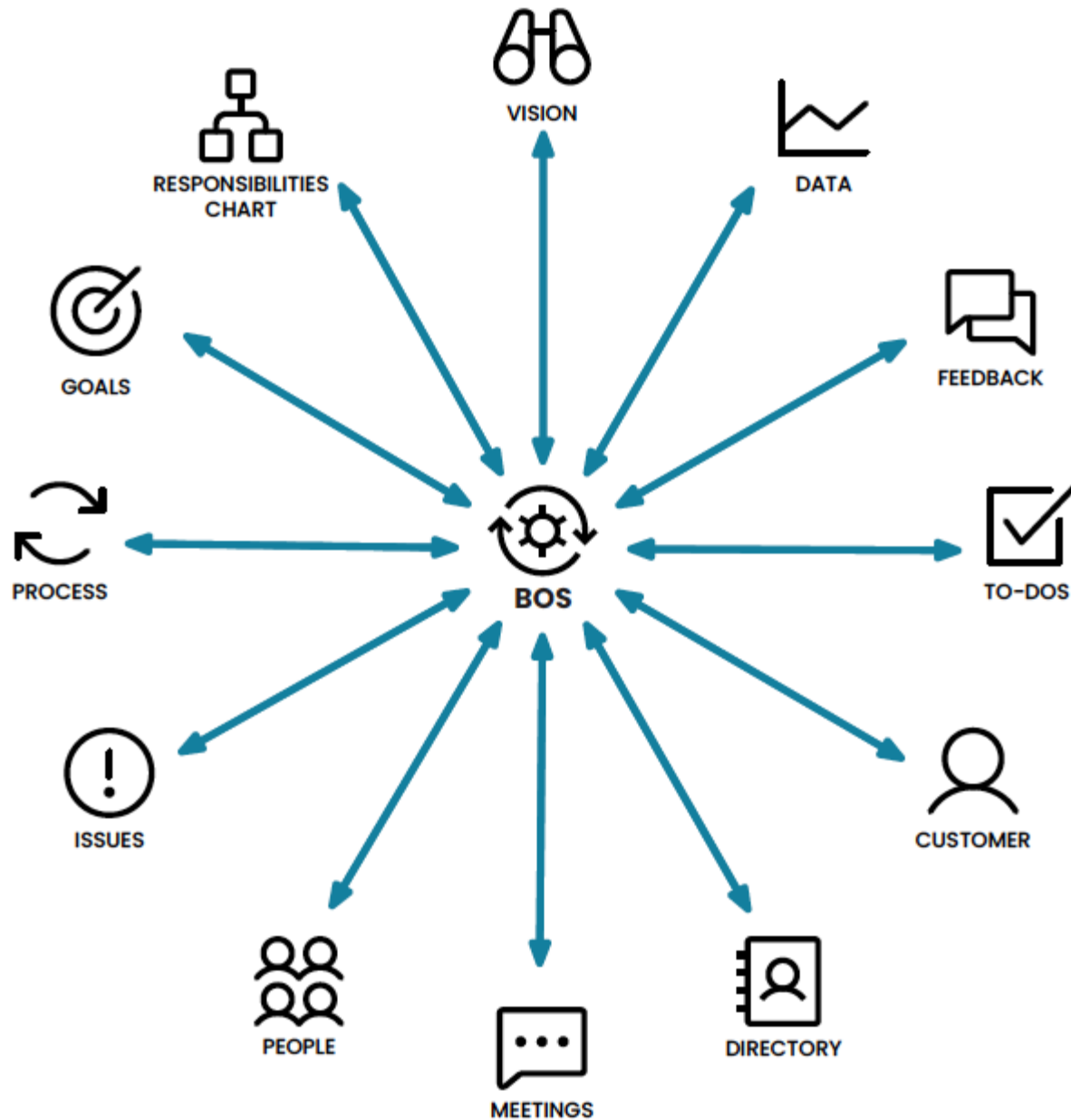


First OS

BUILD A GREAT BUSINESS







A Business Operating System (BOS) is the collection of tools and disciplines an organization uses to make decisions, align priorities, and focus the human energy in the business.

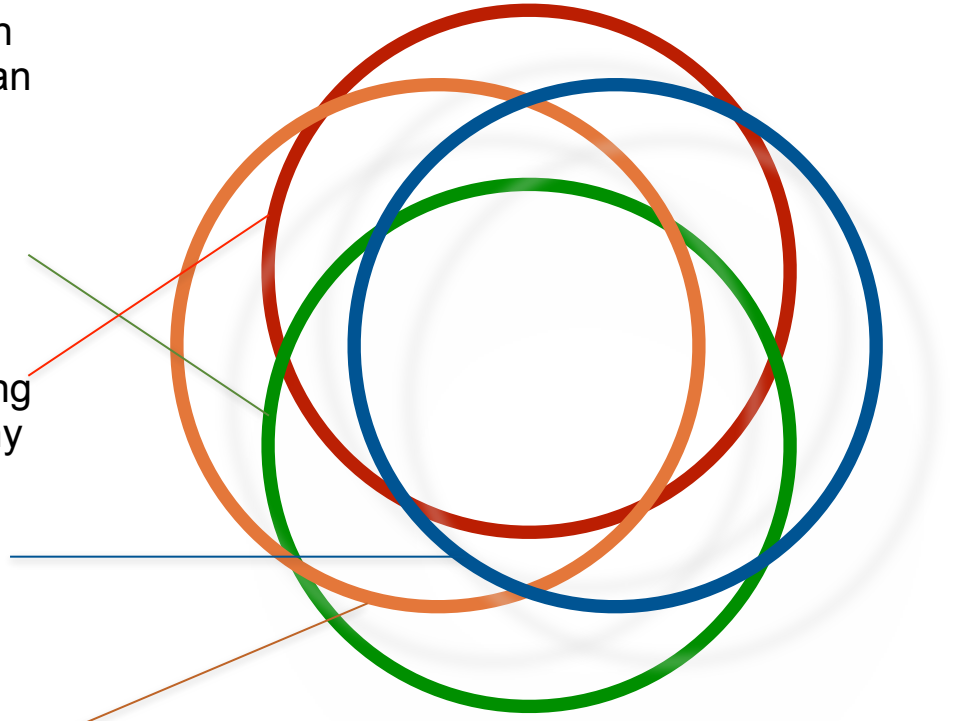
Every organization has an operating system. Most early-stage ventures have an *Accidental Operating System*.

**First OS** is a light-weight, fully integrated Operating System where competency in one area strengthens competency in the others.

# Four Workshops – Any Order

**FirstOS** is implemented in 4 Workshops; each one stands alone but can be integrated with the tools and disciplines of the other sessions. You can take them in any order and as many times as you need.

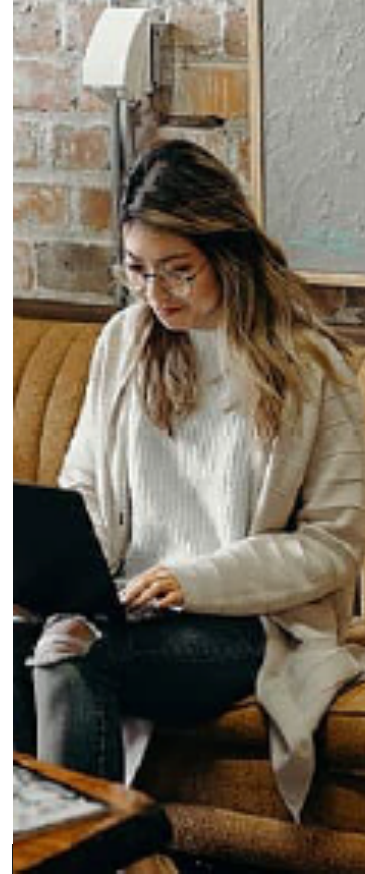
- **Vision Building**: Participants outline the vision for their business and chart a course toward clarity on the vision for all the team members and stakeholders.
- **People Mastery**: Learn the essential tools and disciplines for identifying the best people for your business and keeping them aligned with Healthy Accountability.
- **Strategic Planning**: Learn and apply proven methods for establishing goals throughout your business that maximize the energy being applied to your vision.
- **Superior Execution**: Learn the tools and processes that hundreds of thousands of successful companies have embraced to ensure meetings are productive, problems get solved forever, and things are done the right, best way every time.





# Participant Benefits

- Best Practices tuned to early-stage companies looking for significant and sustainable growth:
  - Average company growth increases 50% annually
  - Companies are twice as likely to grow at twice the industry average
  - Companies are less than 1% as likely to fail
  - Company valuations are 10% to 40% above industry average
- Due diligence time and effort are reduced significantly
- Better and more productive board & mentor engagement



Vision    Goals    Long-Term Issues    SWOT

CAGs: 2030 Target Leadership

12/31/30: 1) one of the most trusted brands in the world, and 2) we will have over 10,000,000 people meaningfully using our products.

- Have thousands of stakeholders who are investors
- Likely a B-Corp
- Best in class in design
- Education is a core component of who we are
- Have a vibrant community - both overall and with small interest based communities
- Global company supporting numerous languages

- Leveraging our data to help people be better and better, more evolved and capable, version of best selves
- 90+ percent of our one year plus paying clients have 90% of employees using our platform
- Not for profit Institute for the Advancement of Actualization
- High Trust relationships with 90% of our stakeholders

2-Year Leadership 1-Year Leadership Back Leadership

Participation in the **First OS** sessions includes a subscription to Ninety, the software for capturing, sharing, and mastering your Business Operating System.

Run Rate Expense as % of Rev		100%	Run Rate Expense as % of Rev		140%	Run Rate Expense as % of Rev		145%
<b>KPIs:</b>			<b>KPIs:</b>			<b>KPIs:</b>		
Paying Users	480,000		Paying Users	166,000		Paying Users	112,660	
NRR	125%		NRR	125%		NRR	130%	
Overall CAC v2	\$2,700		Overall CAC v2	\$2,000		Overall CAC v2	\$	
Total Cash Position	\$20,000,000		Total Cash Position	\$14,000,000		Total Cash Position	\$17,000,000	

## Vision Building

Participants outline the vision for their business and chart a course toward clarity on the vision for all the team members and stakeholders.

- Core Values
- Focus Filters
- Mission, Vision & Purpose
- Audacious Goals
- Go-To-Market
- Product Market Fit

## People Mastery

Learn the essential tools and disciplines for identifying the best people for your business and keeping them aligned with Healthy Accountability.

- Responsibility Structure
- Predictive Assessments
- Building a Leadership Team
- Leading and Mentoring
- Giving Feedback that works
- Delegation

## Strategic Planning

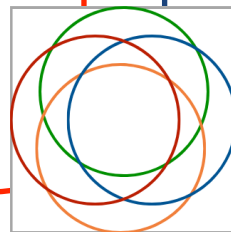
Learn and apply proven methods for establishing goals throughout your business that maximize the energy being applied to your vision.

- Modeling an Uncertain Future
- Long-term Planning
- Annual Planning
- Quarterly Planning
- Testable Theories and Diligent Patience

## Superior Execution

Learn the tools and processes hundreds of thousands of successful companies have embraced to ensure meetings are productive, problems get solved forever, and things are done the right, best way every time.

- Great Meetings
- Solving Problems
- Staying Focused
- Measuring & KPIs
- Documenting Process





# FirstOS Peer Group Workshops

- An Early-Stage-Venture-focused BOS Implementation
- Learning Portal with tutorial videos and guides for the whole team
- Four Half-Day Sessions
- Multiple Peer Companies per Session
- Office hours and team coaching, included
- \$1000/category or \$3500/person for all four categories
- Partner organization offer significant discounts





# 2024 Q1 Workshops

Date	Workshop	Location	Registration
2/22/24	Superior Execution	<a href="#">In-Person @ ILC</a>	<a href="#">Register Here</a>
2/22/24	Superior Execution	Zoom	<a href="#">Register Here</a>
2/27/24	Vision Building	Zoom	<a href="#">Register Here</a>
2/27/24	Vision Building	<a href="#">In-Person @ ILC</a>	<a href="#">Register Here</a>
3/7/24	Strategic Planning	Zoom	<a href="#">Register Here</a>
3/7/24	Strategic Planning	<a href="#">In-Person @ ILC</a>	<a href="#">Register Here</a>
3/12/24	Vision Building	<a href="#">In-Person @ ILC</a>	<a href="#">Register Here</a>
3/13/24	People Mastery	Zoom	<a href="#">Register Here</a>
3/13/24	People Mastery	<a href="#">In-Person @ ILC</a>	<a href="#">Register Here</a>

## ILC In-Person Workshops

Impact Leadership Center  
 6100 Rockside Woods Blvd, Suite 100  
 Independence OH 44131  
 1 PM to 5 PM ET

ILC events include a reception afterward in the ILC Game Room.

You can register for any combination of workshops.

Until the Learning Management System is fully operational, all workshops will cost \$250 each, billed at the end of March 2024.

Questions about which workshop to join or anything else? [Schedule time here:](https://calendly.com/jim-haviland/learn-about-ia-and-bos)  
<https://calendly.com/jim-haviland/learn-about-ia-and-bos>