



# Vivid Vision

The following is our COO Alliance 2022 Vivid Vision. Creating a Vivid Vision brings the future into the present, so everyone has clarity on what we're building now. It's a detailed overview of what the COO Alliance will look like, act like, and feel like three years out — by December 31st, 2022. Sharing it with others helps it become reality!

2022

### Our Members

**The COO Alliance is the only network of its kind in the WORLD for those who are second in command.** The quality of our members continues to grow. Three years ago, our founding members were mostly from companies doing \$3–30 million in revenue and companies with 25–200 employees. Now our minimum criteria for membership is \$5 million in revenue or capital raised. We have a Platinum membership program for companies that are doing more than \$100 million in revenue or have more than 250 employees, and we have exclusive events just for them.

All 250 COO Alliance members are active participants with a strong desire to learn, a

willingness to share, and the vulnerability to never be the smartest person in the room. They recognize that their growth as COOs comes from learning from each other, conversations with peers, and teaching COOs at smaller companies. Our Online-Only members have access to recorded content and their own private Slack group. Through monthly live Q&As via Zoom meetings and Slack with other members and myself, they receive hands-on, personal attention to support them with their challenges and celebrate their successes so they can continue to grow themselves and their companies.





## What It Looks Like

We host online monthly events every month, and members can also elect to attend any of our three annual In Person events as well. We just held our second annual COO/CEO Summit, where we invited the CEOs to attend along with their COOs. Our members interact with each other between meetings via our COO Alliance App, our private Slack channel, and Zoom to continue supporting each other in their growth.



## Location

All our monthly events are held via Zoom. Our In Person events are held at amazing properties in sunny Scottsdale, Arizona and the mountainous ocean-side city of Vancouver, Canada. I host opening night cocktail parties at my home. The perfect weather allows us to do many of our breakout sessions and meals outdoors, and we incorporate morning yoga, bike rides, hikes, and fun into all our events.

## World-Class Content

The content from the COO Alliance events comes in a variety of forms:

- Member-to-member learning breakouts
- Small group workshops
- Informal time
- Book Club
- 10-minute talks given by members on their own areas of expertise
- Expert guest speakers who come in to share with us

We operate the meetings in a confidential environment that allows everyone to feel comfortable in truly sharing and opening up with each other.



Members give presentations to the group on areas where they feel stuck, and receive in-depth feedback and experience sharing from other members. We work through a variety of forms, worksheets, and exercises to encourage members to be introspective and grow themselves as leaders and grow their companies' revenue, profitability, customer engagement and employee culture.

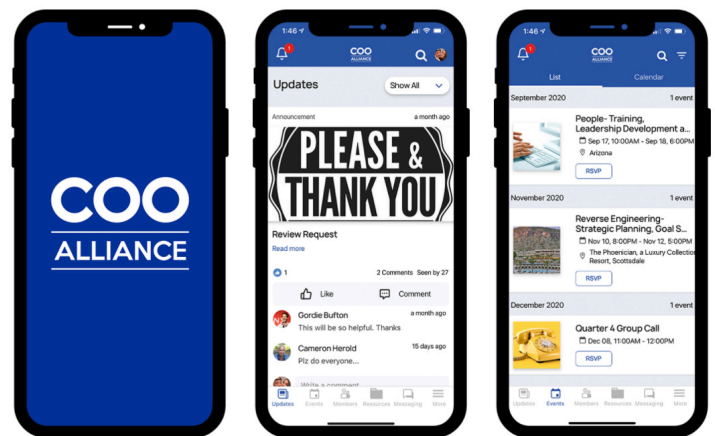
We have amazingly deep discussions as a group at all events. And we frequently share tips for members in their private Slack group, as well as upload 10-minute talks into our private Members App so they can share the content with their company's employees and never miss a beat. Members also share this video content with their company's employees. We also share all our "Second in Command" podcasts with members, and frequently interview their companies on the podcast as well. This gives them a unique opportunity to showcase their expertise, broaden exposure, achieve influencer status, and increase traffic to their business.

The content from the COO Alliance events covers a variety of core topics:

- CEO/COO Relationship: Building an unbreakable bond amongst rapid change
- Strategic Thinking & Planning: Gaining clarity around vision
- Operations & Execution: Transforming ideas into reality
- People & Processes: Recruiting, Interviewing, Selection, Topgrading, Onboarding, Handcuffing A-Players, & Offboarding
- World-Class Culture: Cultivating an amazing workplace culture that attracts employees & clients like a magnet
- Technology Tools: Leveraging & streamlining people and processes
- Leadership & Skill Development: Increasing confidence & capabilities
- Meetings That Don't Suck: Running highly effective, impactful meetings
- Coaching & Delegation: Attracting & growing a Unique Ability team
- And more...

## Connect & Recharge

At all monthly events we members really get to know each other. And we often have super fun social components. At each In Person event we do a fun activity with the group such as Top Golf, Escape Rooms, Camelback hikes, cycling, golf, morning runs, and yoga. This serves as a reminder to disconnect and have some fun, in addition to providing an opportunity to connect with each other on a deeper level outside the meeting space.



## Benefits & Community

Since day one, we've told members they'll leave with ideas that are worth 10X their investment in either savings or new revenue, or we give them their money back. No one has ever taken us up on it. Our Member NPS hovers around +90% at each event. We've built out an accountability component to the COO Alliance, so now members push each other throughout the year to put their ideas into action. They finally feel like they have "their tribe" to learn from. Members not only get value from working one-on-one with me at

these events, but they find the greatest advantage in learning from each other. Plus, they no longer need to waste their time attending CEO events where there is little information targeted specifically at them. This is their tribe.



### The Culture

Members greatly appreciate the time to slow down, think, plan, and work on both themselves and their company without the day-to-day distractions of business. Our onsite film and audio crews capture content throughout all the meetings for offline and online COO Alliance members to learn from and review between events. The culture we're building in this mastermind is one of focused personal and business growth. We're all in this to grow ourselves and our companies in an open and trusting environment. We've created a culture where we can be vulnerable with each other and comfortably share our fears, insecurities, weaknesses, dreams, desires, and goals. And we finally feel like we have support from our peers for the first time. As COOs, we aren't here to goof off, but we still have fun while we work. We assist each other with our growth initiatives between meetings, providing an extra level of accountability and support.

### Marketing

We've done a great job marketing the COO Alliance to find new members. All of our leads go into a sales funnel so that we can not only market to potential members, but also add value to them as COOs before and after they join. Our website shows the statistics of current member companies, and includes profiles of members and their raving testimonials. We have marketing set up on autopilot through Facebook, other social media platforms, magazine ads, direct mail, and LinkedIn. And we have re-targeting in place so that prospects consistently see us even before they've decided to join.

Our "Second in Command" podcast and magazine columns build credibility, and we leverage that into signing up stronger and stronger members and companies into the COO Alliance.





We're getting a ton of exposure in the press about the program, our members, and our team. Referrals from CEOs encouraging each other to have their COOs join account for 30% of our signed new members.

## Our Team

We're a fast-growing, high-energy team of self starters and doers, with a high level of passion and pride in our mission. Our COO handles all the key parts of the company, allowing everyone to focus on their areas of Unique Ability. We have fantastic people in place to head up Marketing, Affiliate Programs, Sales, Social Media, Technology, and Finance. We still leverage freelancers globally too. We have productive and fun team meetings to align everyone quarterly, monthly, and weekly. Our dashboards keep us focused on the critical areas of the business so we continue to attract new members, curate world-class content, and help millions of COOs grow their people, culture, and profits.

