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# The Valuable Agency™ Cohort

## BUILD A TRANSFERRABLE AGENCY SO YOU HAVE OPTIONS

24 Sessions · 7 Core Value Drivers · 12 Months · For \$1M - \$3M Women Agency Owners Who Want Exit Options

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Your agency is functional. You've been around for a minute. You're good at what you do, but you know you don't want to do this forever. So maybe it's time to start thinking about what a 1-3 year transition period might look like...

With The Valuable Agency™ Cohort, a year from now, you'll have:

- An agency that doesn't need you in every room.
  - Financials a buyer can actually read.
  - Services that run without you.
  - A team that decides, delivers, and grows.
  - A valuation you can defend.
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### THE VALUABLE AGENCY™ COHORT 24-SESSION PROGRAM BREAKDOWN

#### LAUNCH · BASELINE

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**W1 The Valuable Agency™ Baseline Score** See your starting score across all 7 value drivers — and understand exactly how a buyer evaluates your agency so you know where the gaps are before you build.

#### DRIVER 1 · PERSPECTIVE

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**W2 Founder Identity & Role** Surface the mindset patterns and daily habits keeping you embedded in every decision — and get a clear-eyed look at where your time actually goes vs. where it needs to go.

**W3 Vision + Values** Define the mission and standards that will survive a transition — then build them into how your business operates with or without you in the room.

**W4 Perspective, Operationalized** Leave with a role transition plan, documented delegation decisions, and your vision and values embedded into weekly team rhythms.

#### DRIVER 2 · PROFITS

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**W5 Financial Current State** See your financials the way a buyer will — revenue history, EBITDA, client concentration, A/R, cash flow — and honestly name what you can't currently see but need to.

**W6 Profits, Operationalized** Build the live financial dashboard, reporting structure, and monthly close process that keeps your numbers current, clean, and audit-ready at all times.

#### DRIVER 3 · POSITIONING & PRODUCTIZATION

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**W7 Positioning** Clarify who you serve, what you charge, and why clients choose you — then document it so your market story is consistent everywhere it needs to be.

**W8 Productization** Turn your top services into repeatable, packaged offerings with defined scope, pricing, and delivery processes — so they run without you in every engagement.

**W9 Positioning & Productization, Operationalized** Leave with ideal client criteria documented, at least one service line fully productized, and a clear pricing review process going forward.

#### DRIVER 4 · PLANNING & PROJECTIONS

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| <b>W10 Strategic Planning Process</b>                  | Build annual, quarterly, and monthly planning cadences that produce consistent decisions whether you're in the room or not — and get them owned and on the calendar.        |
| <b>W11 Projections</b>                                 | Connect your strategic goals to a financial model with conservative, expected, and stretch scenarios — and align your compensation structure to protect your EBITDA.        |
| <b>W12 Planning &amp; Projections, Operationalized</b> | Complete a 3-year financial model, a budget tied to your goals, and a hiring roadmap connected directly to your revenue targets.  |
| <b>DRIVER 5 · PIPELINE</b>                             |   |
| <b>W13 Growth Levers</b>                               | Map every place your lead generation, sales process, and client retention run through you personally — then build the documented system that removes you from the equation. |
| <b>W14 Pipeline, Operationalized</b>                   | Leave with a CRM structure, a documented end-to-end sales process, and revenue projections connected directly to your financial model.                                      |
| <b>DRIVER 6 · PEOPLE</b>                               |   |
| <b>W15 Organizational Design</b>                       | Map the org structure your growth plan actually requires — including your leadership philosophy, succession plan, and the hiring roadmap to close the gap.                  |
| <b>W16 Operationalized Leadership</b>                  | Build the check-in cadences, scorecards, and accountability frameworks that keep your team aligned and performing without you holding it all together personally.           |
| <b>W17 People, Operationalized</b>                     | Walk away with an accountability chart, key roles defined, feedback rhythms established, and a hiring plan tied to your revenue targets.                                    |
| <b>DRIVER 7 · PROCESS</b>                              |   |
| <b>W18 SOP Integration</b>                             | Identify the three processes most at risk if a key person left tomorrow — and start building the documented operating manual that makes delivery founder-independent.       |
| <b>W19 Agency Performance Management</b>               | Audit your tech stack, cut what doesn't serve you, and build a KPI system around leading indicators your team can actually manage in real time.                             |
| <b>W20 Process, Operationalized</b>                    | Leave with a mapped client experience, a started SOP library, a clean tech stack, and a KPI scorecard your team can actually use.   |
| <b>BONUS · PROTECTION</b>                              |   |
| <b>W21 Owned Assets</b>                                | Inventory your IP, proprietary systems, and network as deal-relevant assets — then build habits to document, protect, and compound their value over time.                   |
| <b>W22 Protection, Operationalized</b>                 | Leave with your IP documented and protected, risk and compliance gaps addressed, and intentional practices in place for reputation and network management.                  |
| <b>CAPSTONE · EXIT READINESS</b>                       |   |
| <b>W23 Exit Readiness</b>                              | Get a complete picture of your exit readiness across every dimension — financial, operational, organizational, and personal — so you leave with clarity, not just a score.  |
| <b>W24 VALUABLE Score + Next Steps Roadmap</b>         | See how far you've moved from your W1 baseline, identify your highest-leverage opportunities, and leave with a clear roadmap for what comes next.                           |

**We can't guarantee the exit, but we can guarantee you'll be ready.  
Let's go, lady.**

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