

The Valuable Agency™ Cohort

BUILD A TRANSFERABLE AGENCY SO YOU HAVE OPTIONS

24 Sessions · 8 Core Value Drivers · 12 Months · For \$1M - \$3M Women Agency Owners Who Want Exit Options

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.

THE VALUABLE AGENCY™ COHORT 24-SESSION PROGRAM BREAKDOWN

LAUNCH · BASELINE

W1	The Valuable Agency™ Baseline Score	See your starting score across all 8 value drivers — and understand exactly how a buyer evaluates your agency so you know where the gaps are before you build.
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DRIVER 1 · PERSPECTIVE

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.
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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.
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W4	Perspective, Operationalized	Leave with a role transition plan, documented delegation decisions, and your vision and values embedded into weekly team rhythms.
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DRIVER 2 · POSITIONING & PRODUCTIZATION

W5	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.
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W6	Productization	Turn your top services into repeatable, packaged offerings with defined scope, pricing, and delivery processes — so they run without you in every engagement.
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W7	Positioning & Productization, Operationalized	Leave with ideal client criteria documented, at least one service line fully productized, and a clear pricing review process going forward.
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DRIVER 3 · PLANNING & PROJECTIONS

W8	Strategic Planning Process	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.
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W9	Financial Visibility & Benchmarks	See your financials the way a buyer will — revenue by client and service line, EBITDA, concentration risk, A/R, and the industry benchmarks your agency is measured against whether you know them or not.
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W10	Projections	Connect your strategic goals to a financial model with conservative, expected, and stretch scenarios — and align your compensation structure to protect your EBITDA.
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W11	Planning & Projections, Operationalized	Complete a 3-year financial model, a budget tied to your goals, and a hiring roadmap connected directly to your revenue targets.
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DRIVER 4 · PIPELINE

W12	Growth Levers	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.
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W13	Pipeline, Operationalized	Leave with a CRM structure, a documented end-to-end sales process, a retention and expansion framework your team owns, and revenue projections connected directly to your financial model.
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DRIVER 5 · PEOPLE

W14	Organizational Design	The org structure your growth plan actually requires — including your leadership standards, succession plan, and the hiring roadmap to close the gap.
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W15	Operationalized Leadership	The check-in cadences, scorecards, and accountability frameworks that keep your team aligned and performing without you holding it all together personally.
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W16	Agency Performance Management	The KPI system, performance visibility, and accountability infrastructure that keeps your team aligned and executing without you managing every detail — and the rhythms that make it sustainable.
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W17	People, Operationalized	Walk away with an accountability chart, key roles defined, feedback rhythms established, and a hiring plan tied to your revenue targets.
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DRIVER 6 · PROCESS

W18	SOP Integration	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.
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W19	Team Enablement & Technology	Build the training infrastructure, onboarding process, and cross-training systems that keep institutional knowledge in the business — then audit your tech stack, cut what doesn't serve you, and identify where automation can do work your team shouldn't have to.
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W20	Process, Operationalized	Leave with a mapped client experience, a started SOP library, a clean tech stack, and a KPI scorecard your team can actually use.
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DRIVER 7 · PROTECTION

W21	Owned Assets	Inventory your IP, proprietary systems, and network as deal-relevant assets — then build habits to document, protect, and compound their value over time.
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W22	Protection, Operationalized	Leave with your IP documented and protected, risk and compliance gaps addressed, and intentional practices in place for reputation and network management.
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DRIVER 8 · PREPAREDNESS

W23	Exit Readiness	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.
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W24	VALUABLE Score + Next Steps Roadmap	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.
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**We can't guarantee the exit, but we can guarantee you'll be ready.
Let's go, lady.**

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