



# SOMERSET CEO SERIES

*Your playbook for creating happiness and building business value.*

**The Somerset CEO Series Value Proposition:** The program will add value by:

- Providing an overall business consulting system and tools— The Playbook
- Providing group training by a business consultant with years of experience
- Providing individual coaching, mentoring and accountability sessions with the facilitator
- Encouraging collaboration among participants within a confidential and secure environment
- Creating friendly competition and mutual accountability among participants
- Promoting business networking within the group and generating lifelong friends and business partners

**The Somerset CEO Series Structure:** There will be a combination of bi-monthly group meetings and bi-monthly individual coaching and mentoring sessions over a period of 20 months. For example, Group Session 1 will be a half-day group session; the following month you will have a two-hour individual coaching session with the facilitator; you will attend Group Session 2 the next month; an individual coaching session the month after that and so on.

The bi-monthly group meetings begin with a collaborative review of the exercises completed during the previous 60-day cycle to leverage and reinforce the value provided by completing same. The remainder of the time is allocated to a combination of techniques to maximize the value of the time we spend together. We provide classroom instruction relating to the current session topic. We review relevant case studies to illustrate the concepts focused on in that group session. Lastly, we work collaboratively on exercises to ensure that all participants have a deep understanding of the new exercises to be completed by the next group session. Topics and goals for the group sessions are as follows:

<p><b>Group Session 1</b> <b>Develop and Communicate Your Dream</b> <i>Define your championship season. What does success mean for you?</i></p>	<p><b>Group Session 2</b> <b>Prepare Your Scouting Report (Part I)</b> <i>Begin your championship season with a solid foundation of knowledge about your industry, your business environment and competition.</i></p>	<p><b>Group Session 3</b> <b>Prepare Your Scouting Report (Part II)</b> <i>Begin your championship season with a solid foundation of knowledge about the profitability of your customers and your products/ services.</i></p>	<p><b>Group Session 4</b> <b>Prepare Your Game Plan</b> <i>How is your team going to compete and WIN by being different? Completing your strategic plan.</i></p>	<p><b>Group Session 5</b> <b>Develop Your “Dream Team” (Part I)</b> <i>Draft the right players and get them into position to succeed.</i></p>
<p><b>Group Session 6</b> <b>Develop Your “Dream Team” (Part II)</b> <i>Motivate your players to be part of a winning team with compensation, recognition and reward systems.</i></p>	<p><b>Group Session 7</b> <b>Develop and Maintain a Raving Fan Base</b> <i>Develop an integrated marketing, sales and customer service strategy.</i></p>	<p><b>Group Session 8</b> <b>Make Sure You Can Finance Your Dream and Track Your Progress</b> <i>Develop operational budgeting and cash flow forecasting capabilities. Develop your scorecard.</i></p>	<p><b>Group Session 9</b> <b>Protect Your Dream (Risk Management)</b> <i>Manage potential conflicts, protect tangible and intangible property, prepare for disasters and provide for management and ownership succession.</i></p>	<p><b>Group Session 10</b> <b>Execution: Stay Focused on Your Dream and Make It a Reality</b> <i>Playing the game and winning the championship! Creating happiness for all the stakeholders of the business.</i></p>

During the bi-monthly individual coaching and mentoring sessions, we will review your progress towards completing the exercises and work with you one-on-one with any questions you may have. The participants are required to provide their completed assignments to the facilitator by the next group meeting.

At the end of the 20-month Somerset CEO Series, the Playbook for your business will be complete. Somerset will hold a graduation celebration, and graduates will receive a framed certificate symbolizing their achievement.

**Who Would Benefit from the Somerset CEO Series?** CEOs, Presidents, Plant Managers, Division Managers, anyone with direct P&L accountability for an individual business unit and anyone in the line of succession for any of these positions.

**The Somerset CEO Series Investment:** The fee is \$500 per month for the 20-month series. Because of the cumulative nature of the series and the time investment required by Somerset to provide the program, this is a contractual commitment up-front for the entire series. There will be automatic credit card processing of the \$500 membership fee each month.

**The Commitments of Each Participant:** Attendance at all of the group meetings is highly recommended, and actively participating in the group meetings is expected. Ongoing communication within the group over the 20 months and beyond is encouraged. Committing to scheduled times for the bi-monthly, two-hour individual coaching/mentoring sessions is necessary for the facilitator to manage the schedule.

You can be confident that all information you share within the Somerset CEO group will not be disclosed to anyone outside of the group. A Confidentiality Agreement will be required for all participants.

**Apply for Membership in the Somerset CEO Program:** Please contact Howard Cox at 317.472.2167 or hcox@somersetcpas.com. There is a maximum number of 12 members per series, so please contact us as soon as possible.