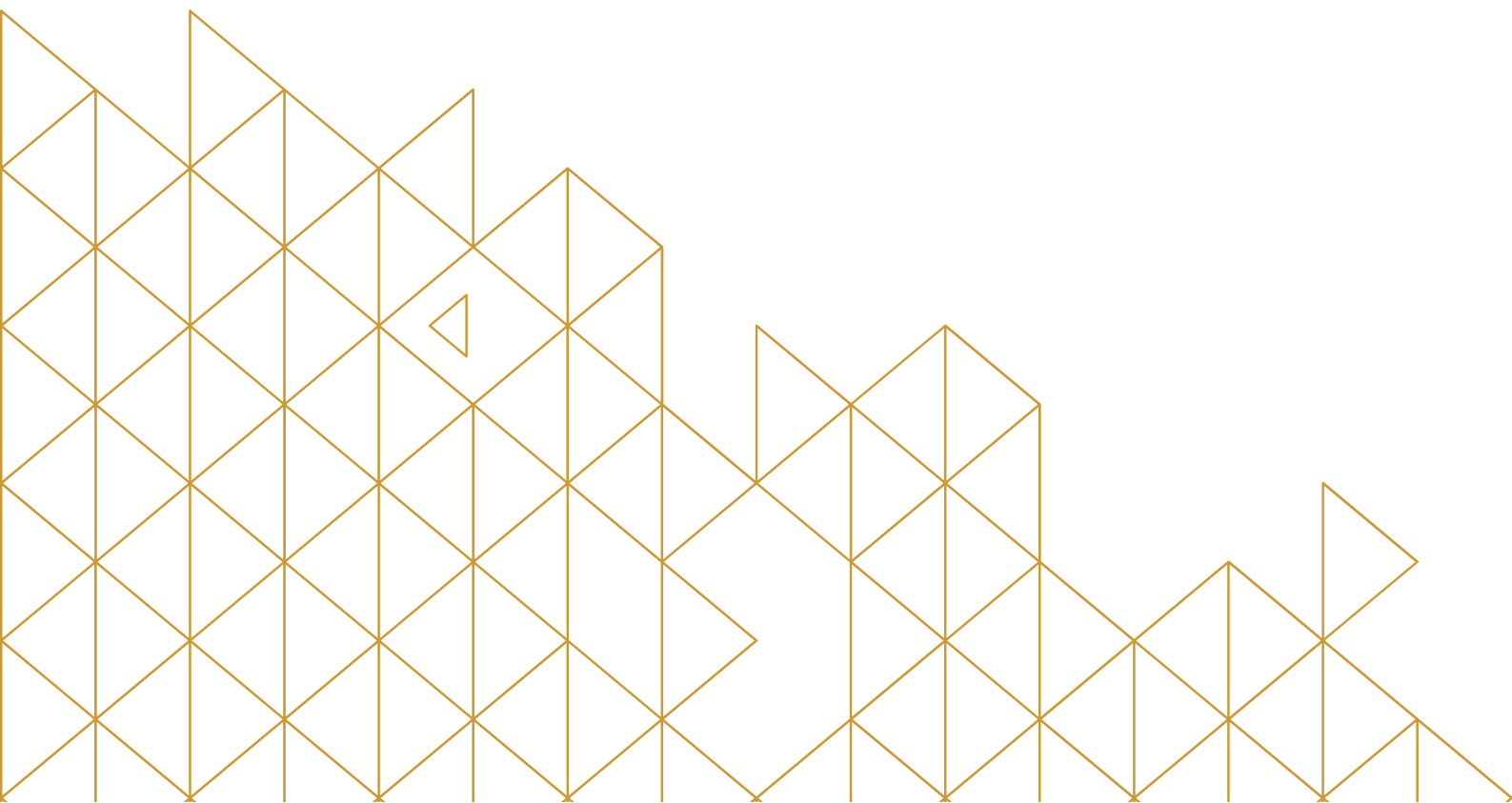




BE | **WEALTHY**
MASTERMIND

July 2022
Park City, Utah

Name:



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Name: _____

Date: _____

WHAT IS YOUR NUMBER

How much do you want to earn in the next 12 months?

Annual Income Goal = _____

Annual Income Goal: _____ / .30 = _____ (Annual Sales Needed)

Annual Sales Needed: _____ / 250 Working Days = _____

_____ **\$\$ In Sales Needed Daily**

BE WEALTHY

PERSONAL FOCUS CARD

BE | WEALTHY

Name: Mastermind Session Date:

PASSIVE CASH FLOW:

Previous Year Total Cash Flow:

Current Monthly Cash Flow:

Current Net Worth:

YOUR RESULTS:

OPERATING BUSINESS(ES):

Previous Year Net Income:

Current Year Net Income:

YOUR RESULTS:

YOUR TOP 3 HIGHLIGHTS SINCE WE LAST MET :

1.

2.

3.

TOP 3 THINGS YOU ARE LOOKING FORWARD TO IN NEXT 90 DAYS:

1.

2.

3.

TOP 5 BUCKET LIST ITEMS:

1.

2.

3.

4.

5.

*The tragedy in life does not lie in not reaching your goal.
The tragedy lies in having no goal to reach.*

- Benjamin Mays

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PERSONAL EVALUATION CARD

BE | WEALTHY

THE ENTIRE PERSON:

Your Job:

Your Business;

Your Finances:

Your Physical Health:

Your Key Relationships:

Your Personal Life:

Your Spiritual Life:

YOUR #1 CURRENT GOAL:

AREAS OF REFLECTION:

1. Define your ideal life. Write it out like it is a story line in a movie. Where do you live? Do you have multiple homes? Where are they? Where do you work? What is your role in your company? What is your dream company like? What is your relationship with your kids? How are you involved as they get older?

2. How much passive income do you need for your ideal life?

3. Do you live in your ideal home now?

4. Do you have your ideal company today?

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GUIDE TO RITUALS

	CEO's Rituals	Operation's Rituals
Daily		
Weekly		
Monthly		
Yearly		

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CEO PERFORMANCE SCORECARD

Rank your performance as CEO in each category on a scale of 1-5
(1 being non-existent and 5 being excellent)

DELEGATE

1 2 3 4 5

Hold regular 1-on-1's with all direct reports weekly at scheduled time, review KPI's and priorities.

1 2 3 4 5

Provide rope to the team members who run most independently.

1 2 3 4 5

Send items to other people for execution.

1 2 3 4 5

End meetings with few to no action items for yourself.

1 2 3 4 5

Being a strategist and a problem solver. Identifying if the team is off track and dive in to help.

1 2 3 4 5

Easily able to identify when someone is overloaded and cannot receive any additional delegated items.

1 2 3 4 5

Easily able to identify when someone has slack in their time and could be utilized for delegated items.

1 2 3 4 5

Have a formal mentor

1 2 3 4 5

Have an informal mentor

1 2 3 4 5

Meet regularly with cohort of CEO's with similar company stage to yours (learn from peers regularly)

1 2 3 4 5

Have an executive coach

AUDITING YOUR CALENDAR REGULARLY

1 2 3 4 5

Review your calendar regularly to evaluate where your time is allocated.

1 2 3 4 5

Eliminate all meetings/items where your involvement is not uniquely crucial to the success of a task.

1 2 3 4 5

Eliminate random external meetings.

SAYING NO MORE OFTEN

1 2 3 4 5

Creating boundaries for meeting times. You are in control of your meeting times. You are placing meeting requests within your working hour time blocks.

1 2 3 4 5

Not participating in excessive networking events.

1 2 3 4 5

Prioritizing the one or two highest-impact events to attend or speak at in a given quarter.

REALIZING YOUR OLD WAY OF OPERATING WILL NO LONGER WORK

1 2 3 4 5

Your time is spent on the tasks that you can uniquely do to make your company successful, letting go of that which can be done by others (even though you may enjoy them).

FINDING TIME FOR THE THINGS YOU CARE ABOUT IN LIFER

1 2 3 4 5

You schedule and complete exercise a minimum of three times per week.

1 2 3 4 5

You honor date night with your significant other one night per week (and actually go on a date)

1 2 3 4 5

You have one "no work day" per week.

1 2 3 4 5

You take one three-day weekend per quarter.

1 2 3 4 5

At least once per year, you take one to two week vacation and go "offline" for large portions of the trip.

TOTAL:

DIVIDE TOTAL BY 23 FOR YOUR **CEO SCORE:**

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USER MANUAL FOR _____

Conditions I like to work in	The time/hours I like to work	The best ways to communicate with me	The ways I like to receive feedback
Things I need	Things I struggle with	Things I love	What makes me impatient

USER MANUAL FOR _____

What I want to be involved in	My deal breakers	Other things to know about me
When I want to hear from you	Don't surprise me with	

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YOUR BUSINESS:

Mission Statement:

Vision

Overarching Long Term Goals (3-5 year plan):

WHAT IS MANDATORY IN YOUR BUSINESS

(-hint: It cannot be everything)

Performance

Feedback

Planning

Daily

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Recruiting, Hiring and Maintaining Talent

Recruiting Best Practices

Rank your organization in each category on a scale of 1-5 (1 being non-existent and 5 being excellent)

- | | | | | | |
|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|---|
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have a Job Description for every role in the organization. |
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have standardized questions for each candidate |
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have a structured interview protocol. Each interviewer has a focus area to evaluate the candidate. |
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have standardized scoring for each candidate. |
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have a standardized process for reference checking. |
| <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | We have processes to ensure the diversity of candidates |

Recruiting Structures

Indicate with a checkbox which recruiting structure your organization is currently utilizing and which recruiting structure you should be utilizing based on your growth plan.

Currently Utilizing Need to Implement

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Early Days: Your Team as Recruiters |
| <input type="checkbox"/> | <input type="checkbox"/> | Initial Scaling: The in-house Recruiter |
| <input type="checkbox"/> | <input type="checkbox"/> | High Growth: Multiple Recruiting Org Roles |
| <input type="checkbox"/> | <input type="checkbox"/> | Executive Hires: Retained Recruiter |

Employee Onboarding

Evaluate your current employee onboarding process by indicating YES or NO.

Yes No Notes

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you send a Welcome Letter to the new employee (cc all teams the person will be working closely with?) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you provide a Welcome Package to each new employee (swag, books, handwritten notes, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you implement a Buddy System? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do they have real ownership of existing projects? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you set and lead to 30-60-90 goals? |

Employee Evaluation

List your current employees that have been with you for more than 2 years. In the boxes to the right, indicate if they are "Employees that Scale", or "Employees with Old Timer Syndrome"

	Employee Name	Employees that Scale	Employees with Old Timer Syndrome
1		<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	<input type="checkbox"/>
3		<input type="checkbox"/>	<input type="checkbox"/>
4		<input type="checkbox"/>	<input type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>
6		<input type="checkbox"/>	<input type="checkbox"/>
7		<input type="checkbox"/>	<input type="checkbox"/>
8		<input type="checkbox"/>	<input type="checkbox"/>
9		<input type="checkbox"/>	<input type="checkbox"/>
10		<input type="checkbox"/>	<input type="checkbox"/>

Early Employee Evaluation (Old Timers)

Using the list above of any "Employees with Old Timer Syndrome" evaluate the path forward

1.) Identify the problem and whether it is solvable. Is it one of the following issues (Y or N):

	Yes	No
• Does not evolve with the company	<input type="checkbox"/>	<input type="checkbox"/>
• Cannot scale into the role they want	<input type="checkbox"/>	<input type="checkbox"/>
• Feeling left out	<input type="checkbox"/>	<input type="checkbox"/>
• Inappropriate exertion of power	<input type="checkbox"/>	<input type="checkbox"/>
• Getting too rich	<input type="checkbox"/>	<input type="checkbox"/>

2.) Put emotions aside and understand if there is a problem

3.) Address the issues head-on.

Employee Name:

Path Forward:

Employee Name:

Path Forward:

Employee Name:

Path Forward:

Employee Name:

Path Forward:

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Building Your Executive Team

Your Current Executive Team

Name:	Current Role:	Potential Future Role:
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

What Key Hires do you need to make in the next 12-18 months on your Executive Team?

-
-
-
-
-

Rank Your Current Executive Team (on a scale of 1-5):

Trait	Self	Exec #1	Exec #2	Exec #3	Exec #4
Functional Area Expertise					
Do they understand the major issues and common failure points for their functions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do people in their organizations respect their opinions and feel they can learn from them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are they right for the current scale and trajectory of your company? (possible underhire or overhire can occur)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trait	Self	Exec #1	Exec #2	Exec #3	Exec #4
Ability to build and manage a team in those functional areas					
Can they recruit exceptional people? Can they build a recruiting culture within their teams?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they know how to motivate people in their functions? (ops vs. sales)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can they effectively manage people from their function? (ops. vs. sales)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they understand how to build out an organization with multiple layers if needed? How deep have they managed in the past and how does that fit your current needs? (12-18 months out)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collegiality					
Do they play well with other executives who are their peers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can they put a collegial, mutually supportive environment in place for the company as a whole as well as their function?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they try to do what is right for the company even if it is not in their own best interest??	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they fit your Culture?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strong Communication Skills					
Are they strong at communication across the company?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can they consistently get other executives and the CEO on board with team changes, promotions, road maps, goals etc?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are they able to understand underlying issues and communicate them within their teams?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they have "cross-functional empathy" that allows them to work with and communicate effectively with other functions they work with closely?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner Mentality					
Do they take ownership of their functions and make sure they are running smoothly and effectively?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they own problems and solve them? Can they engage in "block box" abstraction of their functions so the CEO can engage with them, but does not need to be involved day-to-day?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do they understand that, as company executives, they should think like owners?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trait

Self **Exec #1** **Exec #2** **Exec #3** **Exec #4**

Smarts and strategic thinking skills

Do they think strategically and holistically about their functions?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Do they think about how their functions can be a competitive advantage for the company? (most companies are only good at one or two things. Companies that can tackle more than one thing well tend to outshine- Apple with hardware design, supply chain, and marketing)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Are they first principles thinkers? Can they apply their expertise in knowledge in the context of your company, team, and product? Or do they just try to implement exactly what they did for their last role?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

HIRING FOR CULTURE AND VALUES

1. Determine the sort of Values and Culture you are optimizing for. Ask yourself the following questions, and get input from the broader employee base.

What are the cornerstones of your company's culture? What sort of values do you want people you hire to have?

What are you willing to compromise on? What are you not? (note: if you are willing to compromise on it, it is not important to you).

How do you plan to screen for these values in your interviews? What questions do you plan to ask at each stage to surface candidates' values? For example, if you are selecting people who will dive in proactively to solve problems they identified outside of their own responsibilities, ask about past examples where they have done so in other jobs.

How do your values, interview questions, and filters ensure you can attract and hire diverse candidates.

2. Look out for Red Flags

People whose sole motivation is financial.

Arrogance

People who will likely create a bad environment for the rest of the team.

3. Optimize for the Long Term

Don't compromise. If there is a doubt, there is no doubt.

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Name: _____

Mastermind Session Date: _____

TOP 10 TAKEAWAYS:

NEXT STEPS:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____