

Location on Website	Product Name	Short Description	Long Description
<b>Strategic Planning</b>			
Strategic Planning	Strategic Business Audit: Your Actionable Roadmap to Freedom and Focus		<p>Strategic Business Audit: Your Actionable Roadmap to Freedom and Focus</p> <p>Do you feel like you're working harder than ever but stuck on a plateau? When you're spinning your wheels, it's a sign that it's time to stop working in your business and start working on it with a clear, strategic eye.</p> <p>My Strategic Business Audit is the essential first step in my "Blueprint to Freedom" process. It's a comprehensive review of your current operations, client journey, and systems, designed to give us the clarity we need to build your path forward. We'll identify exactly where you're losing time, energy, and opportunity.</p> <p>This audit is more than just a document; it's the beginning of your transformation. You will receive an actionable roadmap to move beyond your current challenges and build a business that can truly run without you.</p>
		Ready to move past your current plateau?	
		This comprehensive business audit is the first step in my "Blueprint to Freedom" process. We review your operations, systems, and client journey.	This is the path to systematizing your operations and finally reclaiming your time—freeing you up to focus on what matters most: serving your clients with excellence and creating meaningful memories with your loved ones.
Strategic Planning	Take Back the Wheel VIP Day: A Strategic Planning Intensive	A strategic planning intensive for the visionary leader who feels stuck in the details. In this one-on-one session, we'll create a clear, actionable roadmap for your business's growth so you can get back to leading with confidence.	<p>Are you a visionary leader who's feeling stuck in the daily details of your business?</p> <p>In this truly personalized, one-on-one strategic planning intensive, I will personally guide you through my proven process to create a simple, actionable roadmap for your business's growth.</p> <p>We will create your "My Business Success Plan," outlining a clear action plan for the next quarter and a high-level strategy for the next 12-24 months, followed by two months of accountability check-ins.</p>
Strategic Planning	The Business Efficiency Toolkit	Trade business chaos for calm focus with this comprehensive toolkit. Use proven templates to create clear systems for your operations, projects, and quarterly planning, giving you the space to lead effectively.	<p>Ready to trade business chaos for calm, genuine focus? This toolkit is your complete resource to get back in control.</p> <p>With my proven templates, you'll create simple, clear systems for your daily operations, projects, and quarterly planning.</p> <p>This is more than just organization; it's about creating the space you need to lead your business effectively while being fully present for the life you love.</p>
<b>Digital Products</b>			
Digital Products	Launchpad: An Introduction to TravelJoy	This self-paced digital course is your friendly guide to mastering TravelJoy without the overwhelm. Learn to create systems that reduce daily stress, save valuable time, and help you focus on planning incredible client memories.	<p>Is learning TravelJoy on your to-do list but you're not sure where to begin?</p> <p>This self-paced digital course is your friendly guide to setting up and using this helpful tool for your travel business. As your educator, I'll walk you through TravelJoy's most important features in simple, recorded sessions.</p> <p>You'll learn how to create systems that reduce your daily stress and give you back valuable time. My goal is to help you build a more streamlined business, so you can focus on what you do best: planning incredible memories for your clients.</p>
Digital Products	SOP Template	The perfect first step to a calm, consistent business. This easy-to-use template helps you create clear Standard Operating Procedures to streamline operations, empower your team, and build a business that can thrive without you.	<p>Do you ever wish you could clone yourself just to make sure things are always done the right way? This template is the next best thing.</p> <p>It's my personal, easy-to-use guide for creating the clear Standard Operating Procedures that will help calm the chaos in your business. I designed this template to be simple and customizable, helping you outline your critical workflows so anyone on your team can feel confident and aligned.</p> <p>This isn't just about documentation; it's about building a business that can run smoothly, even when you decide to step away for a well-deserved break.</p>
Digital Products	The Clarity Call SOP	A simple framework for confident client conversations. This SOP helps you build genuine connections, present your value clearly, and turn initial chats into wonderful client relationships, reducing the stress of sales.	<p>Do you get a little nervous before a call with a potential new client?</p> <p>This is my personal framework for guiding those important first conversations with grace and purpose.</p> <p>This isn't a rigid script, but rather a simple, repeatable process to help you build a genuine connection, ensure your potential client feels truly heard and understood, and end every call with a clear, professional next step.</p>

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Digital Products	Cashflow Worksheet: A Clear Path to Financial Peace of Mind	A clear path to financial peace of mind. This easy-to-use template helps you gently track income and expenses in one organized place, calming the chaos of financial guesswork so you can plan with confidence.	Does thinking about your business finances feel a little stressful?  This easy-to-use template helps you gently track your income and expenses in one organized place.  It's a straightforward system that helps calm the chaos of financial guesswork, giving you the clarity needed to make confident decisions for your business and plan for the future with peace of mind.
<b>Technology Management</b>			
Technology Management	Dubsado Demystified: Your Strategy for Seamless Setup	Get a clear plan for Dubsado before you build anything. This strategic intensive provides a complete roadmap for success, auditing your current processes and mapping out how Dubsado can genuinely support your brand.	Feeling overwhelmed by Dubsado?  This strategic intensive is designed to give you a complete roadmap for success. We'll start by auditing your current client processes, then map out exactly how Dubsado can simplify and automate your workflows.  The result is a personalized implementation plan—the essential blueprint you need before the build.
Technology Management	Dubsado: The Essential Beginner's Jumpstart	Your done-for-you Dubsado setup. This service is for the business owner who wants to skip the stress and have an expert handle the essential setup of their CRM system right from the start.	Ready to stop juggling spreadsheets, calendars, and payment reminders?  This done-for-you service is your fast-track to getting Dubsado set up correctly, without the stress and tech headaches.  It includes core configuration, 4 custom schedulers, 5 essential forms, and 5 product packages to create a streamlined and professional system that saves you time.
Technology Management	Dubsado: Perfect My Process	A focused session to fix your biggest Dubsado bottleneck. This quick, powerful, hands-on intensive is designed to solve one specific, frustrating workflow problem to bring you immediate relief and efficiency.	Do you have Dubsado mostly under control, but there's one critical part of your process that just isn't working?  This hands-on intensive is focused on optimizing a single workflow in your Dubsado account.  We'll identify your biggest bottleneck, then I will personally help you refine, rebuild, and automate that one process, providing training so you can use it with confidence.
Technology Management	Dubsado: The Ultimate CRM Overhaul	A complete, top-to-bottom revamp of your Dubsado system. This week-long intensive is for the established business whose CRM is no longer keeping up, resulting in a fully optimized and sustainable system that works for you, not against you.	Is your Dubsado system working against you?  This week-long, comprehensive service is designed to entirely restructure your Dubsado from top to bottom.  The process includes a comprehensive audit, full system restructure, detailed customization, and personalized training to leave you with a seamless, professional system that supports your growth.
Technology Management	The Ultimate Tech Overhaul	A guided, "Done with You" audit to regain control of your business technology. We'll work together to analyze your entire tech stack, eliminate redundancies, and create a strategic roadmap for a more efficient and stress-free business.	This "Done with You" experience is designed to help you regain control of your technology with an expert guide by your side.  You'll use my comprehensive Templated Audit to inventory your systems, after which we'll have a 90-minute review call to create a detailed Implementation Roadmap.  This service includes lifetime access to video modules and nine months of access to bi-weekly office hours.
Technology Management	The Mini Tech Makeover	A DIY audit with expert strategic review. This program empowers you to audit your own tech systems using video modules and templates, then solidifies your findings into an actionable plan during a 90-minute review call with an expert.	Ready to get a handle on your technology but not sure where to begin?  This program empowers you to audit your own systems with video modules and templates, then meet for a focused 90-minute review call where we turn your findings into a powerful, actionable plan.  It includes three months of access to bi-weekly office hours for support as you go.
<b>VIP Day</b>			
VIP Day	Discovery Day: VIP Day - Discovery Day: Find Your Starting Point for Strategic Growth	Unsure where to start? This collaborative VIP Day is for the overwhelmed business owner who needs clarity. We'll audit your current tools, systems, and processes to deliver a tangible, prioritized action plan that gives you a clear path forward.	Are you feeling overwhelmed by your business, unsure of what to tackle first? When you don't know what you need, the first step is always discovery. This VIP Day is a comprehensive diagnostic session designed to give you a complete picture of your business's current state and create a clear path forward.  This is a hands-on, collaborative day where I become your strategic partner. We'll dive deep into your business, starting with an audit of the tools and systems you currently use. We'll document the processes you have and, more importantly, identify the ones you need to calm the chaos. We will also review the "My Business Success Template" to create a framework for your goals.  You will walk away with more than just ideas; you'll have a tangible, prioritized action plan. This Discovery Day is designed to eliminate the guesswork, providing you with the clarity and confidence you need to take meaningful next steps toward building a more efficient and stress-free business.

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VIP Day	VIP Day - Project Audits: Your Roadmap to On-Time, On-Budget Project Delivery	Stop the cycle of missed deadlines and budget overruns with this diagnostic VIP Day. I'll bring my expertise in recovering troubled projects to audit your current processes and in-flight projects, delivering a comprehensive report with actionable recommendations for success.	<p>Are your projects consistently running over budget or behind schedule? When projects fail to deliver as promised, it impacts your bottom line, team morale, and client satisfaction. This VIP Day is a specialized diagnostic intensive designed to get to the root of your project challenges and provide a clear roadmap for recovery.</p> <p>As a project manager known for turning around troubled projects, I will bring my expertise directly to your business for this one-on-one session. We will start by reviewing your current project documentation, templates, and planning processes. Then, we'll take a hard look at your in-flight projects to identify the real-time bottlenecks and points of failure.</p> <p>Following the audit, you will receive a comprehensive report detailing my findings and, more importantly, providing expert recommendations to improve your project planning and execution. This is your chance to stop the cycle of missed deadlines and budget overruns and implement processes that lead to consistent, successful project delivery.</p>
VIP Day	VIP Day - From Chaos to Clarity: A Hands-On SOP Intensive	Turn operational chaos into clarity with this hands-on VIP Day focused on your Standard Operating Procedures (SOPs). Whether we're documenting from scratch or auditing what you have, you'll leave with clear processes and a prioritized report for future improvements.	<p>Are your business processes undocumented, outdated, or simply living in your head? When your team doesn't have a clear guide to follow, the result is inconsistency, inefficiency, and chaos. This VIP Day is a hands-on intensive designed to help you document, audit, and refine your Standard Operating Procedures to create a calmer, more consistent business.</p> <p>This is a collaborative "done with you" session. Whether you're starting from scratch or working with existing documents, I will be your strategic partner for the day. Together, we will either document your core procedures for the first time or review and update the ones you already have to ensure they reflect your current workflow.</p> <p>Following our session, you will receive a detailed audit report. This report provides prioritized, expert recommendations on improving your existing procedures and gives you a clear list of the essential SOPs you still need to develop. This is your chance to finally get your processes out of your head and into a system that empowers your team and supports your growth.</p>