

making your future work

Your pathway to a successful 2nd Half Career

Portfolio Executive Growth Academy

August 2019



FUTURE
Perfect.

Welcome to an exciting new chapter of your life.

Twenty to twenty five years into your career, aged 45-55, you are around half time.

As an experienced professional in employment, are you beginning to feel uncertain about your career path? Are you less confident about the future than the past? Do you find that the demands of your corporate workstyle restrict the life you really want? And are you beginning to realise that the top of the ladder is never going to be reached?

Maybe you are starting to recognise that younger people are coming up behind you and threatening your future. You've already noticed that your peers are not getting the next promotion. You might have already lost a job once and found it harder to find another one at the same level. And all the time the possibility of redundancy or re-organisation hangs over you.

You are beginning to wonder what work will look like in five to ten years time.

There's a strong possibility your future will look a little bit like this... You are made redundant from your senior position in an established firm and the next position you get is at a lower salary in a less prestigious organisation. What's more, there's no opportunity for advancement.

You find the length of time you keep this job will be less. Just two or three years in each job, six to nine months finding the next one, often at less pay: your future as a salaried employee is on a downward path.

What's your game plan if you're facing this future?

It is time to consider your 2nd Half Career options and find a new rewarding workstyle that gives you joy, freedom more time for the people and activities we love.

Our pathway introduces your 2nd Half Career options and the key factors to consider. We show, step by step, the process to find the right choice for you. We describe how the Portfolio Executive Growth Academy will support you to build your offer, develop your skills and overcome the challenges.

You can enjoy the joy, freedom and reward of a Portfolio Executive workstyle.



Charles McLachlan
Founder, FuturePerfect.

We believe work should be a place of joy and freedom and not a place of toil and drudgery.

As we see more and more people getting stuck in workstyles and environments that impoverish them (financially, socially, relationally, spiritually), we have become increasingly passionate about releasing people to become the person they were created to be.

What option is right for you?

There are several options for a 2nd Half Career



Take on a **new permanent job**. This is the conventional approach, but besides having new colleagues and some possible workstyle changes, it's probably no more than a short term fix. And it depends on whether you can actually find one.



Interim / Consulting. Often getting the first contract is easy; it's with an old contact. But too often you are either overworked on engagements or flat out finding the next assignment. The day rate can appear high but once you have adjusted for the effort of finding work or doing unpaid hours to complete engagements, it can be much less compelling with unpaid holiday, sickness and pension contributions.



Non-Executive Director. These can be great roles that are part-time. People are often selected for the names and roles on their CV, like a trophy. If you like to get your hands dirty, then it can be tricky to stay hands off in the role.



Portfolio Executive. Work part-time for several mid-sized businesses in an executive role, helping them grow and deliver results. By having several clients simultaneously, you can afford for one to stop whilst searching for the next. But you do need to cope with juggling thinking day by day.

What kind of workstyle do you want?

The key questions you should ask yourself to ensure you select the right option for you

	Permanent Job	Interim/ Consulting	Non-Executive Director	Portfolio Executive
What seniority in the business do you want to work at?	All Levels	All Levels	C-suite	Director & C-Suite
How much freedom do I want at work?	Low	Medium	High	High
How much stability do I want at work ?	High	Low	Medium	Medium
How much variety do I want at work?	Low – Medium	Medium	High	High
How much hands-on delivery do I want, rather than high level advice?	High	High	Low	High
How much autonomy do I want?	Medium	Medium	High	High
How high is my desire for life-long learning	Medium	Low	Medium	High
How much do I want to choose my working days	Low	Low	High	High
How much flexibility do I want to give time to make an impact beyond work	Low	Medium	High	High

Introducing the Portfolio Executive Role.



A Portfolio Executive takes responsibility for a function in a business

Let us consider the role of a finance director as an example. As a Portfolio Executive you will become the finance director for a number of businesses, responsible for the finance function in each business on a part time basis.

As part of that responsibility, you will ensure they have the right people in finance control, in book keeping, in debt recovery, in purchase order processing etc.

You will bring all your skills as an experienced finance director to become a trusted advisor to the CEO and the board. You may, for example, help them to develop the financial part of their business plan, to develop new funding options, find the right advisors and understand which parts of their business are most profitable.

You give clients wisdom and experience they couldn't otherwise afford

You will do all the functions a finance director does, but, because this is a smaller business, you will be able to spend a lot less time on each client. At a minimum you might spend 1-2 days a month. You will attend leadership meetings, and ensure management accounts are properly produced.

You set the function up for sustainable success

You come into the business and put the systems in place, either through people already employed or people you employ yourself. As you develop the finance capability in one client, you can build up a portfolio of similar roles in other companies.

Case Study

Kim used to run the finance department for a European group. He was dissatisfied with his role and looked for personal and professional growth.

He set out to be a Portfolio Finance Director, taking the pain of the finance function away from busy CEOs. His portfolio rapidly grew to several clients and started to subcontract a team to support him.

FuturePerfect helped him understand the new skills he'd need in running his business. With regular 1-2-1s, he built the resilience to manage sales, conquering fears in recruiting, and developed more compelling presentations.

With a portfolio of clients, he never has to depend on any one relationship. Today he has a rewarding workstyle with freedom and joy. He knows he's making a real difference to many organisations and enjoys building long term trusted relationships.

Portfolio Executive – Is this workstyle for you?

Variety and Flexibility

As a Portfolio Executive, you may be fee earning 12 days a month, with between 4-6 clients, working on average 2-3 days per client per month. If you lose one, it's not a disaster. As the organisation grows, it may require a full-time executive director. For you, that is success and you will probably be invited to continue on the board as a non-executive director.

Financial Freedom

Over time, you should be able to bill between £800-£1200 per day. 10 days a month at £1000 day equals around £120k gross annual income. As you build expertise, experience and reputation, you can increase those rates. You may choose to sub-contract to others supporting roles for the function.

Through this you can develop a highly profitable business. For example, on reaching a £1million turnover, you could deliver £250k profit every year with a relatively small portfolio of clients. This is an entirely realistic outcome for the Portfolio Executive workstyle.

What kind of Portfolio Executive could I be?

Here are a few examples:

- Finance
- Human Resources
- Supply Chain
- Marketing
- Sales
- Product
- Customer Experience
- Digital
- CTO / Technology
- Operations
- Audit

Plus industry specific roles

Building an Portfolio



Is this for you?

- ✓ You are looking to move from a corporate career to working for yourself.
- ✓ You want to take your rich set of skills and experience to multiple organisations.
- ✓ You recognise personal and professional growth must continue.
- ✓ You want to find freedom and joy to do what you love and love what you do.
- ✓ You recognise you need the expert support of others to achieve this transition.
- ✓ You want to establish a rewarding and fulfilling portfolio of clients in the next 2 years.
You want to do this with other similarly minded professionals.
- ✓ You want to work between 2-4 days per week.

A pathway to your 2nd Half Career

Is this 2nd Half Career for me?

Help me launch my new workstyle



How we can help you make your choice for your 2nd half career

Our approach is to help you assess whether the Portfolio Executive workstyle is right for you. We offer a step by step approach giving you the control to make the right choice for you, at every point.



Explore your options

Our website has a short questionnaire you can use to explore what you want for your future career. We have a number of resources to help you think about the options, and whether the Portfolio Executive workstyle is right for you.



Consider what is right for you

We run regular 2nd Half Career Options webinars to help you explore the options with one of our team, and ask questions. You can then book a one-to-one call to discuss further, and decide if you want to go forward.



Discover the Portfolio Executive Option

This is a significant life decision so it's worth taking time away from your busy schedule. The residential weekend helps you to explore, in depth, what it will take – from yourself, from the support of family and friends, and the commitment to drive the growth of your own business as a Portfolio Executive. You will experience the types of training, resources and peer group the Portfolio Executive Growth Academy offers. You will be able to make a fully informed decision whether to step out and commit to a new freedom and joy in your workstyle.



Portfolio Executive Growth Academy

You are committed with us to prepare, launch and grow a portfolio executive business. You will enter a programme to give you the skills and confidence to take control of your 2nd Half Career, building a highly rewarding and sustainable lifestyle.



Thinking in more depth

The Discovery Weekend gives you a chance to explore this new workstyle. For many, this decision is not taken alone, and you're welcome to bring your partner with you, so you can be sure of the right path together.

Whether you join the Growth Academy or not, we believe you will get great value out of the weekend. You will leave with more clarity about yourself, your ambitions and your future.

Experience the deeper programme

At the Discovery Weekend you experience the Residential Weekends of the Growth Academy:

- ✓ **Learn** new techniques, frameworks and tools
- ✓ **Engage** in practical exercises to build up yourself and your business
- ✓ **Self-discovery** and personal development of skills beyond your professional expertise
- ✓ **Peer** support and challenge to help you and your portfolio opportunities grow

Equipped to make choices

During the Discover Weekend, we will help you:

1. Get better **clarity** about the workstyle you want
2. Start **shaping** the portfolio role and services that match your skills and interests
3. **Build** a financial model that works for you
4. **Assess** the time and effort required for success
5. **Know** the pitfalls to avoid

Stay in a Grade 1 Country House

Our base for the weekend is Moggerhanger Park. It is a Grade 1 listed Georgian Historic House set in 33 acres of parkland and woodland. With only 23 bedrooms, it has a personal feel where you can focus on your life choices without distraction. The park and woodland give space to think and talk.

Getting there:



Moggerhanger Park, Park Road,
Moggerhanger, Bedford, MK44 3RW

Only 50 miles from London, the park is
6 mins from the A1 and 20 mins from
the M1



Luton Airport 17 miles away



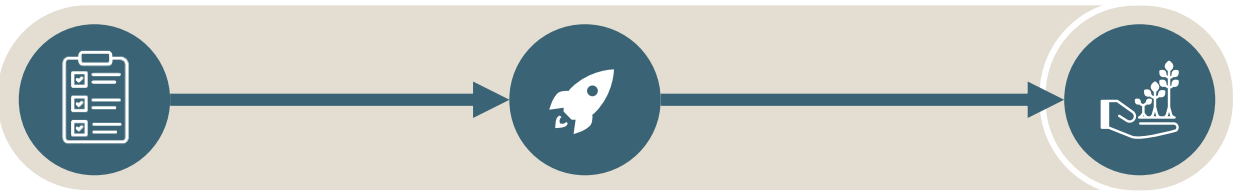
Bedford and Sandy Station, with direct
trains to London Gatwick and Luton
airports, Sheffield and Peterborough

The Portfolio Executive Programme.

Imagine what it will feel like when you have got your first client. And then your second. You are building a business around your skillsets, helping other businesses grow. And it's buffered against the loss of any one client. To get there takes time and effort but we're here with a very personalised and supported programme that creates sustainable success.

Our programme is part-time across two years, enabling you to commence it alongside your existing role. It will teach you how to shape, prepare and launch your business, and start growing your client base. All we ask is that you commit for at least 12 months. Delegates recognise the value they get from continued support as they build their team, refine their proposition, develop their confidence and increase their win rate.

The Curriculum



Prepare

- ✓ How to **start a business**
- ✓ Set the business **purpose**
- ✓ Shape **personal values & mindset**
- ✓ Define the **value proposition**
- ✓ Build a **portfolio business model**
- ✓ Build the **product**
- ✓ Define the **personal brand**
- ✓ Build the **network**

Launch

- ✓ Understand the **sales & delivery cycle**
- ✓ Build **habits for success & resilience**
- ✓ Build **marketing** capability
- ✓ Build **sales** capability
- ✓ Build the compelling **pitch**
- ✓ **Win** first clients

Grow

- ✓ Ensure **customer delight**
- ✓ Build your **team**
- ✓ Run your **business**
- ✓ Overcome **growth traps**

Year 1		Year 2	
Prepare your business, purpose and product. Launch portfolio business with 6 months and win your first clients.		Take your learnings to the next level – from theory to practice. Make your business sustainable with further wins. Build resilience against typical growth traps	
3	Residential weekends of training (plus the discovery weekend)	3	Residential Weekends
6	Bi-Monthly 'Mastermind' Webinars – resolving current issues	6	Bi-Monthly 'Mastermind' Webinars – resolving current issues
11	Monthly 1:2:1 coaching sessions	11	Monthly 1:2:1 coaching sessions
	Access to training videos		Access to training videos
	Access to peer-group collaboration site		Access to peer-group collaboration site

Investing in your future work.

What the Portfolio Executive Growth Academy programme will do for you



Feel

Satisfied I went on this programme

Pleased because I've done what I said I would do

Confident I made the right choice

Passionate about what I do

I belong to my cohort, team and movement

Freedom and joy to love what I do

Believe

I am becoming who I was created to be

I can get through my growth traps

I can release the resources I need

My value

I am making a difference

I have a bright future to look forward to

I have new choices and options

Know

How to grow a real business for me

Who my team is

How to build my reputation

Who to call

I am part of a movement

My personal brand

Myself – to a new level

The business assets I need

Do

Spend 60% of my time earning

Meet my financial expectations

Set and follow my business plan

Build my specific value offer

Have enjoyable and rewarding work

A balanced workstyle with joy for those I love

Three levels of commitment starting from £500 per month

	VIP	Standard	Self-Study
Course Length	24 months 1 yr. commitment	24 months 1 yr. commitment	24 months 1 yr. commitment
Key Activities			
1:2:1 with Founder	✓		
VIP Mastermind Group with Founder	✓		
Residential Weekends	✓	✓	
1:2:1 with FuturePerfect Team		✓	✓
Standard Mastermind group with FuturePerfect team		✓	✓
Course Materials	✓ Printed	✓ Printed	✓ Download
Access to a Peer community & collaboration site	✓	✓	✓
Online Video Library	✓	✓	✓

Taking this further.



Your 2nd Half Career choice is yours to take. You can remain uncertain about the present or take control of your future direction. We believe that a Portfolio Executive role gives you the best of both worlds. You can use your proven career skillsets while building a low risk business that's yours to take wherever you want. We are here to make your future work.

What others say about us

“ It doesn't matter how confident you feel in a corporate context - you quickly discover that being a high performer in your field has not prepared you for the mindset and skills you need to create a business. ”

Chris –Growth director

“ When I had one foot in the corporate world and the other foot trying to start my own business, I found it so supportive, knowing that Charles had done that journey himself. ”

Torben –CTO

“ The individual 1:2:1 sessions with Charles have had a direct positive impact on each of my largest sales. I wouldn't have won them without his advice. ”

Pete – Product Director

Learn more



Sign up to join one of our Options Webinars
<https://PortfolioExecutive.biz/webinar>



Sign up to our Tips & Advice newsletters
<http://PortfolioExecutive.biz/>



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