

Next Chapter with Dodie Jacobi

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Application Introduction

Questions about the Next Chapter program or application at any time? dodie@dodiejacobi.com

Even if you're a current or past client and know my mentoring style, please complete the application. Your A's to these Q's will tell us both whether this is the right next best step, so be as specific as you're able; all answers are held in *strictest* confidence. Non-disclosure begins now. I personally process every application to assess compatibility and readiness, and no one else on my team sees your submission.

Is now the time to apply?

The 30-minute application helps you get clear about what you want from collaboration while giving us both a chance to weigh compatibility and value for this important investment in your next chapter. You should apply IF...

- you want the freedom to choose how, when, and maybe even where you work
- you want to earn more than you are able with hourly, bid, proposals, and other finite pricing models
- you want to deliver your very best, most impactful work to your clients
- you know what you want to accomplish next, but not exactly what to do to get it (or you know what to do, but not how to do it)
- you have accomplished a degree of success in your current practice, including having the financial means to invest in the program without adding stress or hesitance
- your clients currently average at least \$24k a year in engagement fees, and have for more than 2 consecutive years
- you are willing to make a significant change in how you do business
- you are willing and able to prioritize the time, money, energy, and individual capacity to accomplish the program in the agreed timeline
- you have the financial resources to engage additional services from your own providers that your transition may require - most typically legal, marketing, and administrative services
- you insist on fun AND profit from your work!

The Application Process

Here's how the application process flows. If at any point, I discover a reason for us not to proceed, you will receive notification immediately, and ask you to do the same. Email me with any questions at any time in the process, dodie@dodiejacobi.com.

Submit Application – The intention of an application is to ensure your compatibility with my mentoring style and program outcomes. I also want to help you assess you're ready to make the most of this next investment in your business and life. Be candid about your position and intentions to assure my most accurate recommendations.

Email Confirmation - After you submit your application, you'll receive an email confirmation that I've received it. If you do not receive the confirmation email within 24 hours, write to me, dodie@dodiejacobi.com.

Application Review – Expect this to take no more than a week after receiving your application. You might hear from me by email to clarify your application or gather more information.

Hour Zoom Call with Dodie – You can expect an email within one week of your application to schedule a conversation to answer your respective questions and further assure compatibility in this important mentoring relationship.

Acceptance and Engagement Agreement - If proceeding is mutually agreeable, you'll receive the program's engagement agreement. Once the signed agreement and initial payment are received, you'll get a Calendly link to schedule your first two sessions during which the remaining meetings will be scheduled for the duration of the program.

A bit of fine print before you apply.

All details of our engagement will be clearly defined and mutually-agreed at the time we commit contractually, but I want you to be prepared with the resources you'll need for our collaboration.

Your investment. The fee for Next Chapter is \$27,600 with payment plans available as follows. Notice that less than full payment options include interest in the schedule.

- 1 payment of \$27,600
- 2 payments of \$14,490
- 4 payments of \$7,590
- 6 payments of \$5,290

Return on Investment. You'll be making a significant investment of time and money in your business for us to collaborate. I want to work with people who've demonstrated accomplishment and are ready to leverage my most impactful knowledge. I will do all in my power to aid and assure your success, but this is not an accountability program. You solely will be responsible for completing the tasks of the agreed Actionable Plan and the outcomes of our collaboration. That said, I am fully committed to assuring your investment in Next Chapter delivers tangible and intangible return that exceeds the program's financial cost. We will maintain a simple dashboard to monitor your return, encouraging a mutually-beneficial and enduring relationship.

Duration of our engagement. I engage with clients for six consecutive months, skipping my sabbatical months of July and December. So for example, if you start in June, we will engage through January, assuring six total months except for July and December during which she is on sabbatical. All Transition Strategy designs assure your progress continues uninterrupted. I *am* available for urgent email support during these months, though "strategic emergencies" are rare.

This engagement may be extended another six months under the same rate, and beyond that for the then-current program rate. Legacy clients are given the first option for the limited vacancies I make available each year. Clients gain a valuable deeper level of value from increasing familiarity that comes from extended engagement, while still benefitting from my objectivity; many clients have worked with me for going on more than a decade and counting.

Format and Access. Next Chapter includes a combination of one-on-one video conference sessions with me for planning and learning, brief reading and other assignments to complete on your own, and between-session email support. The specifics of collaboration will support your individualized strategy and timeline. Engagement includes:

- 2 initial one-on-one zoom sessions in the first month to design your Transition Strategy and 5 more monthly mentoring sessions for course corrections, momentum builders, and learning to assure your independent progress until the next month's session. The prescheduled sessions are video-recorded and saved privately on vimeo for future reference.

You and I will create early in the program a detailed and mutually-agreeable meeting and implementation schedule as part of the Actionable Plan. Meetings last 1.75 hours and are scheduled around my availability during the second week of each month. Meetings are “use it or lose it” to encourage you to prioritize collaboration above the many reasons something more urgent will certainly emerge during this strategic engagement.

In the event you need to cancel a meeting, I will explore a few options for continued Actionable Plan progress: a) email or a brief phone call; b) moving the appointment to another time during the second week of the month, if space is available, at no additional charge; or c) scheduling a session outside of the second week of the month, again if available, for which a Special Requests Rate of \$1750/45-minute session will apply.

- Between-session, as-needed mentorship via email to assure steady progress.
- Access to trusted relationships and proven resources as needed (for example legal counsel or marketing/communications professionals).
- For more support that included in the engagement, as my capacity allows, you may schedule additional one-on-one sessions for an additional investment of \$1750/45-minute session. Advance notice is key to getting on my limited schedule.

Mindset. I'll be sharing ideas, processes, and tools - some that I've proven over decades of practice, and some that are new. Recognize that even proven ideas require testing and refinement to be successful for each new application. My most accomplished clients practice an entrepreneurial mindset of experimentation and adaptability.

Next Chapter Application for 2023

Plan 15-30 minutes to complete the application

Type your answers in the boxes below. You can write as much as you want for the essay answers; the boxes will expand to accommodate your typing. Then save a copy for your records and send it over to dodie@dodiejacobi.com.

Your Current Chapter

Name:

Business Name:

Email:

Phone Number:

Website:

Legal structure (Sole Proprietorship, Partnership, S-corp, C-corp, B-corp):

Number of Employees/Contractors/Team members:

What stage of growth is your business in? (Starting, Earning But Not Yet Profitable, Profitable and Ready to Grow, Profitable But Ready For More or Something Different)

How long have you been in this business?

What's your industry focus and core business?

What problem(s) do you solve and for what market?

What services, products, and programs do you currently offer and approximately what percentage of your total income does each represent?

What is your average client's annual investment in your engagement?

Describe your business and life now including what you most love and what you find unbearable.

Tell me about a time building your company where you had to try, try again to get the results you wanted, and what you learned from it.

Your Next Chapter

It's okay if you aren't completely clear about what's next. You may know only that you don't want to continue your current chapter as it is. Just share what you DO know. Should we proceed to collaborate, the first thing we'll accomplish together is more clarity about how the next chapter will be most rewarding.

When you imagine a Next Chapter, for what period of time are you projecting? (If you're not certain, 3-10 years is a good horizon.)

What does your life ideally look like when you've accomplished what you want next?

What does your business look like?

What else is on your Wildest Wish List for the next chapter, including the things you want but barely dare whisper even to yourself – and the things you can't bear any longer?

Are there any services, products, programs, and ideas you have wanted to implement but have not yet?

What might, or does, hold you back from what you envision next for your life and business?

What do you think further delay costs you in time, money, energy, quality of life?

What reassures you that your vision is possible?

I would consider my investment in Next Chapter a WILD SUCCESS if....*(Fill in the blank with your "that was the best investment I've ever made in my life!" answer!)*

Have you invested in other mentoring, educational, or coaching programs to grow your business; if so, how much did you invest and what was your experience?

Anything else you want me to know to help assure now is the right time for our collaboration?

Please check this box confirming your understanding.

I am submitting this application with no obligation to engage in Next Chapter, or any other of Dodie Jacobi's programs, or to make any payment. I understand all information submitted will be held in strict confidence and used solely for the purpose of assessing readiness and compatibility. If I am accepted into the program, I will receive for review and further consideration the program's engagement agreement, including payment options to which I'll agree before we begin. I am fully committed to prioritize the program's action plan, which Dodie and I will create together based on my available resources of time, money, energy, and knowledge. I understand my role and Dodie's, and I will do my part to get the most from this program, asking questions any time I am unclear or have information that impacts focused progress as agreed.