



### Jean Barrick

Founder & Principal Consultant  
Keynote Speaker

Start-Ups & Scaling  
International Expansion  
Performance Uplifts  
Strategic Planning  
Culture Transformation  
Compliance  
Shared Services  
Leadership Advisory



**BLUEPLAID**  
Business Consulting

## BluePlaid Leadership Workshop Series

*Actionable, insight-driven sessions for founders, executives, and high-growth teams*

*A curated suite of leadership workshops designed to strengthen alignment, accelerate execution, and equip teams with the systems and clarity required to scale.*



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www.blueplaid.net  
+1 (303) 646-7478  
info@blueplaid.net

# 7 Great Courses to Elevate Leaders

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**BluePlaid** is a strategic advisory and leadership development firm specializing in global operations, organizational transformation, and high-growth scaling. For more than 20 years, I've helped executive teams strengthen performance, redesign operating models, and build the leadership structures required for sustainable growth.

I've led global operations across 5 continents and 25+ countries, launched 4 global shared services, built new markets from the ground up, and guided companies through complex transformation and rapid expansion.

These workshops are built from the proven frameworks and methodologies I've used to support C-suite leaders to cross-functional teams navigating growth, change, and operational complexity.

Each session blends strategic insight with hands-on execution, giving leaders the clarity, alignment, and practical tools they need to accelerate performance.

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# THE PERFORMANCE CORE™

A scalable operating model built on clarity, ownership, rhythm, and execution.

## The Four Elements

- ✓ **Clarity** Identity, offerings, value, and strategic priorities.
- ✓ **Ownership** Role clarity, decision rights, and accountability.
- ✓ **Rhythm** Operating cadences, communication loops, and alignment.
- ✓ **Execution** KPIs, dashboards, workflows, and measurable outcomes.

## Why It Matters

High-growth organizations break when clarity and accountability don't scale with revenue. The Performance Core™ creates a unified system that aligns people, processes, and priorities so teams can execute consistently, and leaders can operate at the right altitude.



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# DRIVING CUSTOMER ADOPTION

How to lead clients through change without losing trust, momentum, or product vision.

## The Three Pillars

- **Prepare** - Set expectations, communicate early, and identify friction points.
- **Support** - Provide guidance, resources, and structured change management.
- **Reinforce** - Monitor adoption, close gaps, and strengthen long-term engagement.

## Key Tools

- ✓ **Customer Adoption Curve™**
- ✓ **Readiness Roadmap™**
- ✓ **Friction Audit Post-Launch Stabilization Plan**

## Why It Matters

Even the best solutions fail without adoption. This framework helps teams guide clients through change with confidence, reducing churn, increasing satisfaction, and protecting product vision.



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# STRATEGIC PLANNING THAT ACTUALLY WORKS

**Build annual and multi-year plans that drive alignment, accountability, and results.**

## Core Components

- ✓ **Vision & Direction** - Define where the organization is going and why.
- ✓ **Priorities & Focus** - Identify the 3–5 strategic priorities that matter most.
- ✓ **Execution Systems** - Quarterly plans, KPIs, and accountability structures.
- ✓ **Leadership Alignment** - Clear roles, decision rights, and communication rhythms.

## Why It Matters

Most strategic plans sit on a shelf. This approach turns strategy into a living operating system that guides decisions, aligns teams, and drives measurable outcomes.



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# SCALING WITHOUT BREAKING

The operating model mistakes that kill growth — and how to avoid them.

## Common Failure Points

- ✓ **Founder Bottlenecks** - Too many decisions flow through one person.
- ✓ **Undefined Roles** - Teams lack clarity, ownership, and accountability.
- ✓ **Weak Systems** - Processes don't scale with demand.
- ✓ **Misaligned Structure** - Org design doesn't match growth stage.
- ✓ **Reactive Leadership** - No operating rhythm or forward-looking planning.

## The Solution

A scalable operating model built on structure, clarity, and leadership depth — enabling the business to grow beyond the founder's personal capacity.

## Why It Matters

Growth exposes every weakness. Fixing the operating model early prevents burnout, margin erosion, and stalled momentum.



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# 90-DAY PLAN FRAMEWORK

A structured approach to diagnose, design, and execute for rapid progress.

## Days 1–30: Diagnose & Clarify

- Deep dive into business model, team, and systems
- Identify bottlenecks and strategic priorities
- Redefine CEO role and leadership expectations

## Days 31–60: Structure & Systemize

- Redesign org structure
- Establish operating rhythms
- Build KPIs, dashboards, and accountability systems

## Days 61–90: Execute & Optimize

- Implement new systems
- Coach leaders
- Strengthen workflows and margins
- Build a 6-month strategic plan

## Why It Matters

This framework accelerates clarity, alignment, and execution — creating momentum and measurable progress within the first 90 days.



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# POST-FUNDING READINESS MODEL™

**Distills realities every founder encounters after funding and provides a structured approach to navigating them with clarity, confidence, and discipline.**

## 8 Operational Realities

- ✓ The Shift From Vision to Execution
- ✓ Leadership Models Must Evolve Overnight
- ✓ Scaling Requires a Scalable Operating Model
- ✓ Founder–Investor Expectations Diverge Quickly
- ✓ Hiring Mistakes Burn Runway
- ✓ Compliance Gets Real — Fast
- ✓ Financial Controls & Reporting Expectations Skyrocket
- ✓ Culture Shifts Under the Weight of Growth

## Why It Matters

Post-funding is where companies either scale or stall. Startups that succeed are the ones with the strongest foundations. The BluePlaid Post-Funding Readiness Model™ gives founders the clarity and structure to scale responsibly, avoid costly missteps, and build the operational maturity investors expect.



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# GLOBAL EXPANSION PLAYBOOK™

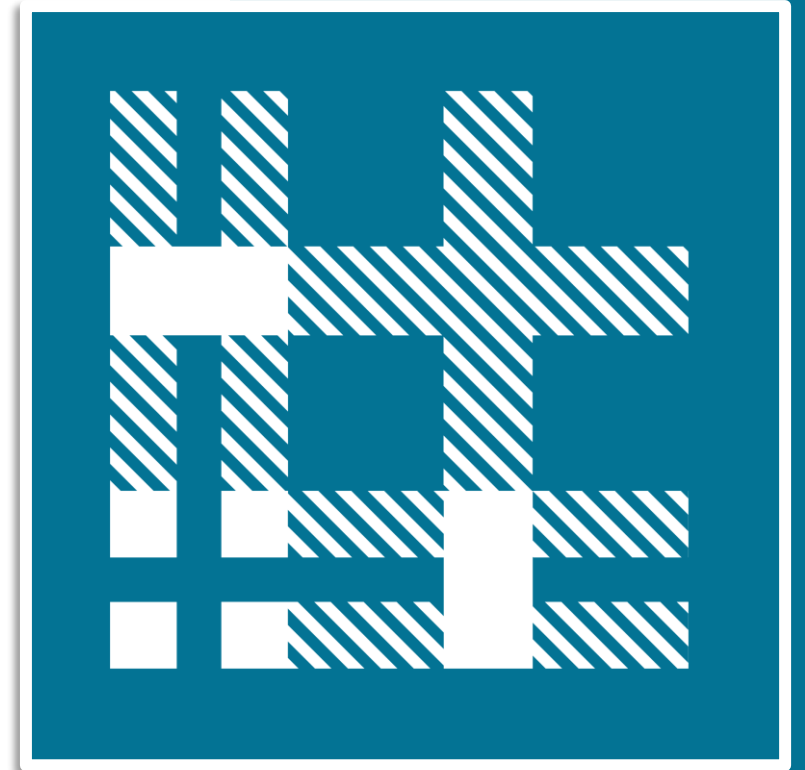
A practical roadmap for entering new markets with clarity, compliance, and confidence.

## Core Elements

- ✓ **Market Readiness** - Demand, competition, product-market fit, and local insights.
- ✓ **Operational Foundations** - Entity setup, compliance, tax, HR, and financial structure.
- ✓ **Leadership & Talent** - Local leadership, hiring strategy, and cultural alignment.
- ✓ **Go-to-Market Strategy** - Positioning, pricing, sales, and customer acquisition.
- ✓ **Scalable Infrastructure** - Systems, workflows, and cross-regional communication.

## Why It Matters

Global expansion fails when companies underestimate complexity. This playbook provides a structured, proven approach to entering new markets without unnecessary risk or operational chaos.



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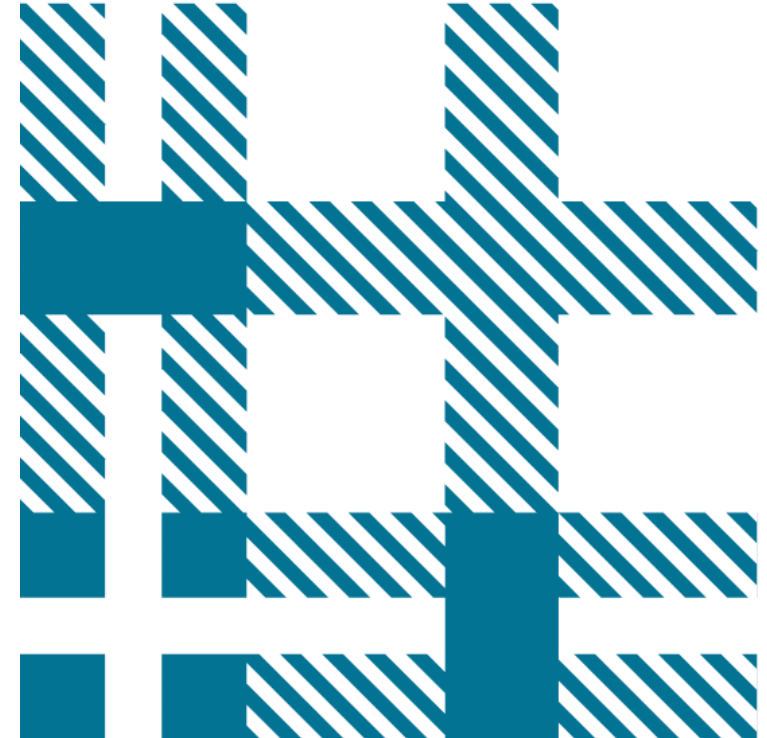
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[info@blueplaid.net](mailto:info@blueplaid.net)