Wise Sherpa

Guiding you through the transition from corporate career to successfully setting up your own business

What is Wise Sherpa?

When you make the decision to leave the corporate world and strike out on your own, we understand it’s both exhilarating and anxiety inducing for good reason. It’s easy to take the environment and functional resources of a corporate for granted, until it’s time to figure out the nuts and bolts of setting up a business (including IT, business development, invoicing etc.) and that’s just the half of it!

At Wise Sherpa, we can help you sidestep the common planning and process pitfalls that sap precious time and energy that could be put to better use building your business. Whether you are launching your own consulting venture, or embarking on a new professional services portfolio career, we will ensure it is built on great foundations.

Our core strength is advising mature professionals. Research\* shows that the individuals most likely to successfully found and grow businesses are in their mid 40s, 50s, 60s, just at the time when it is most difficult to cut the cord from all the support that comes with a corporate career. After a prolonged period of working inside a large organisation, it can be very daunting to take the first step outside, alone.

\*Kauffman foundation

Wise Sherpa approach

Wise Sherpa has developed a five step, ‘Compass’ approach to guide you through the process of leaving the corporate world and setting up your business.

The five key steps of Wise Sherpa approach [designer to create a swirl graphic]

Step 1 - Transition & business planning

Step 1 will help you clarify the vision for your new business and kick off the planning process. You will be asked to complete an initial online assessment as the basis for the initial one-to-one sessions at the start of the programme.

Step 2 - Assessing your strengths

Knowing your strengths will help you understand where to put your focus and effort to ensure you are setting yourself up for success. This step will also identify where you may need to access some additional support. You will also complete a strengths-based assessment based on *Talent Dynamics* for business owners. We will discuss the results with you as part of our one-to-one sessions, enabling you to integrate any resulting actions into your business plan.

Step 3 - Establishing systems & processes

The one-to -one sessions include time to focus on your working practices including your business location, technology (focused on your digital enablement), marketing and sales. As part of this workstream, we will co-develop an approach to optimize your effectiveness. We do this by ensuring you are focused only on the most important tasks, outsourcing the secondary tasks wherever practical to do so. Depending on the potential complexity of your business and your needs, this can be a lighter touch or comprehensive part of the programme.

Step 4 - Reviewing your finances\*

Financial planning and management are key components in setting you up to succeed. We will help you identify the the issues that are important to you and how best to plan and fund your transition to becoming self-employed. One possible outcome is that you may decide to pursue external investment to establish your business, in which case we can connect you into our entrepreneur funding eco-system.

Step 5 - Leading

From day one, we will help you work *on* the business, not just in it. We’ll get you to focus on building and managing your key business networks, resilience and the subtle art of delegation.

\*It’s important to highlight that Wise Sherpa is not authorised or qualified to provide formal financial advice. However, we can discuss the questions and issues you need to consider regarding your business financial planning and management to ensure you are best placed to set yourself up for success as well as share with you some key tools that can help you in this process.

Wise Sherpa programme options

Wise Sherpa has three different programme levels to cater for varying needs and budgets: Compass, Navigator and Guide each last six months with Wise Sherpa as a guide to the five steps approach to successfully transitioning and setting up your business.

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| --- | --- | --- | --- |
| **6 month programme content\*** | **Option 1 - Compass** | **Option 2 - Navigator** | **Option 3 - Guide** |
| Online assessment | Yes | Yes | Yes |
| One-to-one sessions covering five steps approach | 1 x 1.5 hours a month | 2 x 1.5 hours a month | 2 x 1.5 hours a month |
| Talent Dynamics assessment & debrief | Yes | Yes | Yes |
| Support with system(s) selection (but not purchase of systems) | No | Yes | Yes |
| Support with system(s) implementation | No | No | Yes |
| Communication training to pitch your business to clients | No | Yes | Yes |
| Regular networking & info sharing events | For future development | For future development | For future development |
| Top up guiding | Available at additional cost by agreement | Available at additional cost by agreement | Available at additional cost by agreement |

\*Depending on location ideally the first session is face-to-face with the remainder conducted virtually using online meeting technology.

There are three key measures of success on completing the programme:

1. Your level of confidence that you and your business are set for success
2. Time saved in your transition and in operationalising your businesses
3. Incremental income identified and generated in that time

We are also open to designing bespoke, tailored programmes based on your individual requirements.

If you are a co-founder, we can tailor our service to work for both of you. We have a particular interest in life-partners co-founding consulting/professional services businesses.

Who is behind Wise Sherpa?

Wise Sherpa is the brainchild of Rebecca Hill, a former ‘big four ’ global director with an extensive background working for major global professional and financial services organisations. Her most recent role was as global director specialising in people-focused business strategy and organisational change. In this role she developed well-honed intra-preneurial, coaching, mentoring and facilitation skills.

After 25 years in the City, Rebecca is now firmly embedded in the entrepreneurial space having launched several businesses with business partner, James Hasler. They are currently collaborating with a number of Start Ups, Scale-Ups and SMEs providing mentoring and business strategy consulting services. Rebecca is also a founding mentor for the weinsocialtech accelerator backed by Deutsche Bank as well as a business mentor on the New Entrepreneur Foundation’s programme aimed at developing the entrepreneurs of the future.

At the core of her business belief system, Rebecca has a passion for the economic empowerment of women. Whilst at EY she led their global Women. Fast forward programme. She also sits on the UK delegation to the Women20 (W20) – an official engagement group of the G20 – and works with the UK government on policy issues related to women and enterprise.

She holds an MSc in Coaching & Consulting for Change from Said Business School, Oxford University and HEC, Paris as well as being a Chartered Marketer and has lived and worked in several countries.

Additional specialist consultants and support

Wise Sherpa has carefully curated an eco-system of associates and experts which we believe is unique in this space. They can advise on specific areas where you may require additional support based upon your business objectives, experience gaps and needs.\*

\*There maybe additional costs depending on the nature and volume of advice required.

Why work with Wise Sherpa?

There is no doubt that as exciting as it is, sometimes it can be frustrating and even lonely when you start out on your own. An experienced guide will save you time and get you to your destination in the best possible shape for the journey ahead. We will be on hand to help you work through the inevitable challenges (and fears) as well as opening up an extensive, but hard to navigate entrepreneurial eco-system, making your set-up phase much more efficient and productive.

Our programmes are designed to shave 6 months off the time it takes to effectively operationalise your business when compared to acting alone. Compared to many of the alternatives, Wise Sherpa has walked the talk, successfully transitioning from a full-on senior, corporate career to becoming a successful owner of multiple businesses.

We are often asked by clients whether there are any particular areas of expertise that benefit from Wise Sherpa approach? We are currently working with professionals from legal, finance, human resources, change management, supply chain, logistics, procurement and IT sectors in transitioning and setting up their businesses. The key is that you have solid professional experience and are keen to set up a business doing what interests you and what you enjoy!

Clients also wonder when is the best time to work with Wise Sherpa? We usually find it is at the point where you are considering your options regarding your potential corporate exit or you have just exited your corporate career. However, we are working successfully with individuals who have taken a break between their corporate career and are now looking to set up businesses as well as individuals who are slightly earlier, in a more exploratory phase of their thinking, or who are looking to set up their businesses on the side of their corporate career before transitioning or as part of a portfolio.

[Small call out box - What is a Sherpa? Some members of the Sherpa population are known for their skills in [mountaineering](https://en.wikipedia.org/wiki/Mountaineering). Subsequently, Sherpas have become known around the world as mountain climbing guides whose purpose is to guide climbers and help carry the load. Sherpas face the same harsh conditions and take risks as the climbers.]

Exploratory session

If you are interested in exploring whether Wise Sherpa’s programmes are right for you, we offer a free exploratory 45 minute virtual conversation. These carry no obligation and provide us with the opportunity to understand and learn more about each other and share the main issues you are facing in transitioning and setting up your business. It also gives you the opportunity to have your questions answered about Wise Sherpa’s programmes (including the fee structure).

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