CMA

PARTNERSHIP OVERVIEW

The operating partner your clients need next.

Strategy, systems and fractional leadership for the businesses our partners serve.

Referral / Co-delivery / Two-way introductions

Veteran-owned | Dallas, Texas | Catalog revision 3



Senior-led. Built to transfer.



Dallas Coleman

Founder & CEO | Coleman Management Advisors

MBA, JD, FMVA
U.S. Army veteran - eight years in the Army Reserve.

A clear scope, an accountable delivery team and working systems the client can keep.

Reach the firm: hello@colemanma.com

Strategy connected to the work.

Your client hires a team, buys software, prepares for financing or enters a market. The next challenge is connecting that decision to a business that runs. CMA can take on the agreed planning, systems or operating work while you focus on your part.

117+
projects delivered

13+
countries served

5.0 / 5
average client rating

Track-record figures as published on colemanma.com. Based in Dallas; working nationally and internationally.

Growth still needs a business that runs.

01

Tools without a system

New hires and new software need clear workflows, responsibilities and a practical handoff.

02

Strategy that stalls

A recommendation needs someone responsible for implementation and the operating rhythm.

03

Founder bottlenecks

SOPs, dashboards and defined decisions help the team work beyond one person.

Four areas. One accountable scope.

Planning & capital readiness

Business plans, financial models and market evidence that make the business and its assumptions easier to assess.

Operations & leadership

Fractional COO support, SOPs, KPI dashboards and an operating rhythm built around the work.

Systems & automation

Owned operating platforms and workflow automation, with implementation and handoff defined in the scope.

Growth & marketing

Go-to-market strategy, market research and fractional CMO leadership, with production and staffing separately scoped.

Operate and build.

OPERATIONS PLATFORM

Essential platform build	**From $5,000**
Standard platform build	**From $8,500**
Advanced platform build	**From $15,000**
Self-run infrastructure upkeep	**From $80/mo**
Managed by CMA	**$450/mo**

WEBSITES

Initial website build	**$697**
Optional ongoing care	**$199/mo**

PROCESS AUTOMATION

Workflow Map	**$500**
Operations audit + ROI roadmap	**$2,500**
Single-workflow build	**From $2,500**
Larger automation system	**From $10,000**

LEADERSHIP & ADVISORY

Fractional COO	**$6,000-$12,000/mo**
Fractional CMO	**$3,000/mo**
Ongoing Advisory	**From $750/mo**
Hourly consulting	**$175/hr**

CMO: Production and staffing are separately scoped and priced. Go-to-market is optional. Additional work requires an agreed scope and fee. 24 hours included per month. 3-month minimum. Then monthly with 30 days notice. COO: Embedded operating leadership. Scope and monthly fee are fixed in writing on the intro call. Financial modeling and go-to-market are separate practices. 3-month minimum. Hourly: For questions and ongoing or open-ended consulting. Scope and fee agreed in writing; defined deliverables may be scoped as separate fixed-price projects. 3-hour minimum ($525 minimum engagement).

Plan, fund and grow.

BUSINESS PLANS

Essential: raise under $250K	**$1,250**
Raising $250K-$2M	**$2,500**
Raising $2M-$25M	**$5,000**
Project finance / institutional	**From $12,500**

PITCH DECKS

Standard	**$2,000**
Investor-grade	**$3,500**

FINANCIAL MODELING

Standalone model	**$3,500**
Tied to a raise, loan or acquisition	**From $5,900**

MARKET RESEARCH

One focused question	**$1,250**
Comprehensive desk research	**$2,500**

GO-TO-MARKET

Launch a product or offer	**$3,500**
Enter a new market	**$6,500**

ENTRY POINT

Owner's Working Session	**$450**

Fixed-price projects $2,500-$9,500: three equal installments. Above $9,500: 50% to start and 50% on delivery. Essential Plan: three installments also available. Recurring fees follow the written agreement.

Market research shown is desk research. Paid data, interviews, production and staffing are scoped separately where applicable.

Complementary expertise. Shared client needs.

Staffing & talent firms

Help a growing client connect people with processes, responsibilities and operating tools.

Marketing & digital agencies

Connect positioning and campaigns to the operating capacity needed to deliver on demand.

Accountants & CPAs

Bring in planning, modeling or operating implementation alongside your accounting work.

Lenders & capital advisors

Help clients prepare a business plan, financial model and supporting operating story.

Incubators & accelerators

Connect founders with practical planning, launch and execution support.

Veteran organizations

Help veteran-owned businesses find the appropriate CMA service or support program.

Software & technology providers

Connect tools to workflows, implementation, documentation and team adoption.

Independent specialists

Bring a defined expertise, examples of your work and an idea for where we could collaborate.

Three ways to work together.

A

Referral

Introduce a client who needs strategy, systems or operating leadership.

A client need beyond your scope.

B

Co-delivery

Bring complementary expertise to the same client engagement.

A project that needs more than one discipline.

C

Two-way introductions

Build a trusted network around the businesses we each serve.

A longer-term relationship between complementary practices.

Any referral fee, revenue share or other commercial arrangement is agreed together in a written partner agreement. There is no automatic commission or guaranteed volume of introductions.

Align. Pilot. Review.

01 Compare fit

Tell us who you serve, what you do well and which partnership model makes sense. Start with a 30-minute conversation.

02 Define the first engagement

Agree the roles, client communication, scope and commercial terms. Start with one suitable opportunity.

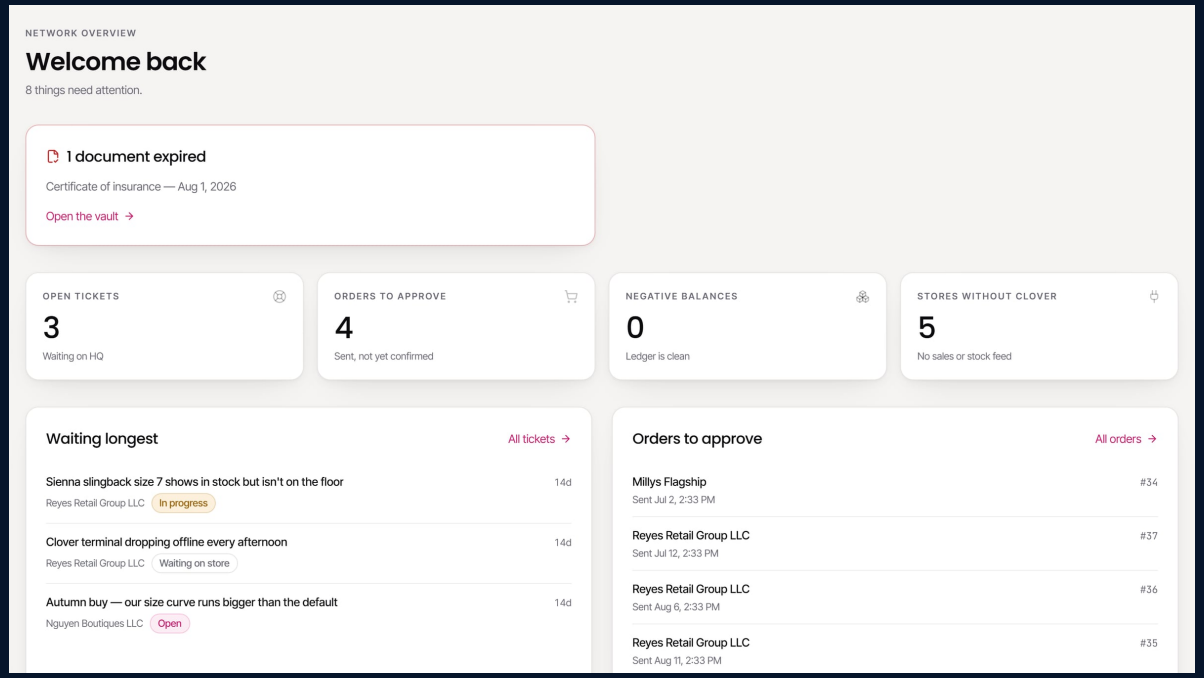
03 Review the working relationship

Look at the delivery and handoff together, then decide how to handle future introductions or projects.



Timing, travel, responsibilities and handoff are agreed for the actual scope.

Work you can inspect.



Cleared portfolio screenshot: Milly's franchise platform. Product example; no financial result is claimed.

Milly's: from operating knowledge to a franchise system

Explore the advisory work, operating playbook and cleared examples from the franchise platform.

Read the case study

Snow Tequila: connect the story to the model

See how unit economics, channels and scenarios connect to an investor-facing business plan.

Read the case study

Start with the fit.

Tell us about your firm or specialty, the businesses you serve and the contribution you have in mind. We will start with a conversation about where the work fits.

01	Your firm or independent specialty
02	The businesses you serve
03	Relevant examples of your work
04	The collaboration model you have in mind

Keep confidential client information out of the first message. Arrange client introductions with their permission.

Build your partnership outline online

Strategy meets execution.

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Book a 30-minute conversation

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