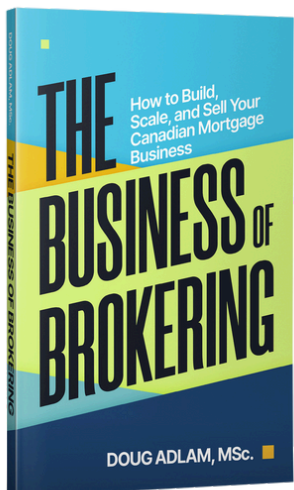


Chapter 7 – Worksheet

Exit Planning From Day One



Purpose: Design a business that can scale, transfer, and sell—starting now. Use this to set your exit vision, build transferability, systematize delegation, and track exit-readiness KPIs.



1) Exit Vision Canvas

Target window (choose one):

- ☐ 2–3 yrs
- ☐ 3–5 yrs
- ☐ 5+ yrs
- ☐ Undecided

Preferred path (rank 1–4):

- ☐ Sell book
- ☐ Sell business
- ☐ Step back (operate w/ GM)
- ☐ Family/partner succession

Personal goals (freedom, income, impact):

Non-negotiables (values, client promise, team commitments):

What would happen if I take 30 days off, revenue continues at >80% of baseline;





3) Delegation Roadmap (30/60/90)

List high-leverage tasks to delegate. Use the Delegation Scorecard Survey to identify candidates.

Task	From (Owner)	To (Role)	When (30/60/90)	Definition of Done / SOP link

Guardrails:

- ☐ Outcomes over methods
- ☐ SLA defined
- ☐ QA cadence set
- ☐ Feedback loop weekly

4) Financial Readiness Checklist

- ☐ Monthly P&L, balance sheet, and cash flow (accrual) produced within 15 days
- ☐ Clean chart of accounts; broker/branch P&L segments
- ☐ Revenue concentration <25% per single partner/source
- ☐ Normalized owner adjustments documented
- ☐ Deferred/renewal revenue tracked; pipeline conversion rate measured
- ☐ KPIs: margin/deal, cost/funded, lead→funded %, cycle time, NPS/CSAT

5) Org & Bench Depth Map

Critical seats and coverage (who covers if the lead is out?).



Seat	Primary	Backup	SOP / Training link
Lead Intake			
Advisor/Broker			
Underwriting			
Docs/Conditions			
Post-Close/Renewals			
Ops/Compliance			

6) Buyer’s Lens – Reverse Due Diligence

If you were the buyer, what would you require to say “yes”?

Operating system & SOPs:





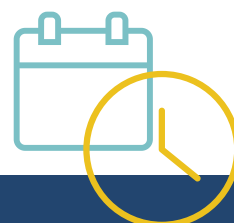
Financial clarity & trends (3 yrs):

Client/partner concentration:

Brand/process transfer plan:

7) 90-Day Exit Sprint Checklist

- ☐ Corporate docs (articles, shareholder agreements)
- ☐ 3 years financials + YTD (P&L, BS, CF)
- ☐ Client & partner agreements, compliance policies (AML, privacy)
- ☐ SOPs & playbooks (sales, ops, service)
- ☐ CRM/DMS data dictionary & export samples
- ☐ Brand assets (process name, templates, scripts, reviews)





8) Delegation Plan

Tasks delegated/week (avg past 4 weeks): % time in CEO work: %

Next 3 tasks to delegate:

1) Task: To: When:

2) Task: To: When:

3) Task: To: When:

***Note: Exit planning is business building.
Revisit this monthly; pair with the Delegation Scorecard Survey.***