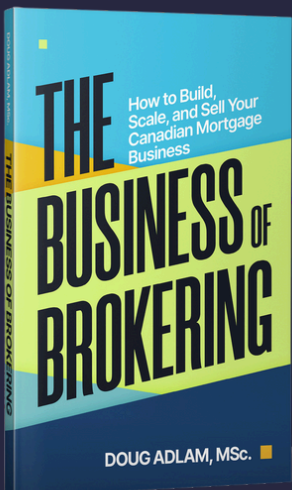


Chapter 8 – Worksheet

Leadership Transitions— From Player to Coach



Purpose: Help you step off the field, build systems and people, and lead with intention. Use this to diagnose resistance, design your operating system, and run a 90-day leadership sprint.

1) Player → Coach Readiness Snapshot

a) Why lead now? (business outcomes you can't reach as a solo player)

b) What will you STOP doing in the next 30 days? (3 items)

1)

2)

3)

c) What will you START doing as a coach? (vision, people, systems)

2) Player → Coach Readiness Snapshot

Document 5 repeatable plays with win (turn them into SOPs/playbooks)



Play / Process	Owner	SOP Link / Status

Guardrails:

- ☐ Named process
- ☐ Checklists
- ☐ SLAs
- ☐ QA step
- ☐ Handoffs defined

3) Coaching Skill Stack (rate 1–5)



Skill	Current	Target	Practice / Resource
Communication (expectations, feedback, vision)			
Emotional intelligence (conflict, empathy)			
Strategic thinking (capacity, quarters)			
Hiring & onboarding			
Delegation & accountability			
Meeting facilitation & cadence			

4) Culture as a Growth Lever



Define the 'This is how we do things here' in 5 bullets.

1)

2)

3)

4)

5)

Stories we tell (origin, client wins, hard lessons):

Rituals (onboarding, wins, retros, huddles):

5) Operating Cadence

Meeting	Purpose	Participants	When	Inputs / Outputs
Daily huddle (10-15m)				
Weekly leadership (60-90m)				
Pipeline/triage (weekly)				
Monthly coaching 1:1s				
Quarterly planning (OKRs/KPIs)				

6) Coaching 1:1 Template (Monthly)

Wins since last 1:1:

Pipeline & blockers:

Metrics review:

Skill focus / assignment:

Commitments (owner + due date):



7) Succession & Bench



Critical Seat	Primary	Successor (ETA)	Development plan
Lead broker/Advisor			
Underwriting lead			
Ops/Compliance lead			
Partner relations			
Sales manager			

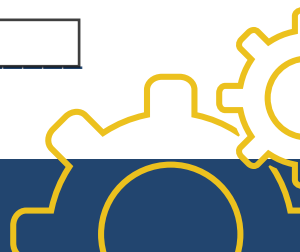
8) Mastermind / Coaching Plan

Group/coach options to explore:

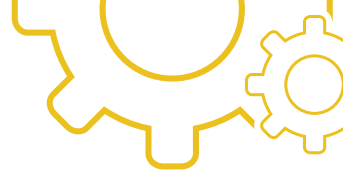
Commitment (frequency, goals, metrics):

9) Origin Story & Gratitude (keep perspective)

People who carried us early (thank & recognize):



Milestones worth retelling to new hires:



10) 90-Day Leadership Sprint

List 3 actions with due dates:

1)

Due Date:

2)

Due Date:

3)

Due Date:

Note: Leadership is a practice. Review this worksheet monthly with your Self-Assessment Quiz and update your sprint.