

identify clarify prioritize

Ready for Next's Owner Goals Identification, Clarification and Prioritization or ICP process is designed to help owners consider and refine their business and personal goals, gain clarity and determine next steps and accountabilities.

what it is

Optimizing business enterprise value and creating transition-readiness requires aligning business and personal goals. Your business is likely your largest financial asset – a primary source of income, as well as the highest percentage of your personal net worth. Future personal financial requirements will shape value growth and transition planning – and vice versa. In addition, some owners struggle to define what their “life after business” looks like. Lacking that crucial information, personal financial planning and aligned business value acceleration programs are incomplete.

this process will help you:

- Understand shared goals and gaps between the owner(s) and possibly other stakeholders (such as family or key employees)
- Flush out “missing conversations” that if unaddressed may get in the way of success
- Align goals with other planning (financial, estate, tax)
- Consider multiple scenarios and ways of satisfying your objectives
- Embrace a “bias for action” approach emphasizing personal accountabilities

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how we do it

In our discussions with owners trying to make sense of their path to higher valuation and possible transition, actionable clarity – which goes beyond just analysis and insights - is always first on the list of deliverables.

Our team meets (either live or virtually with the owner(s) and any other key individuals, like spouses, the next generation of owner(s), and professional advisors to identify, clarify and then prioritize goals.

what we deliver

The Ready for Next ICP process helps owners get everything on the table then re-organize into clear goals with actionable priorities. After all, goals without a written plan are just a dream. We deliver a “charter” outlining the goals that have been identified as a highest priority, as well as others further down the list, a short list of nearterm actions and accountabilities to drive quick wins, and a complete mindmap of all conversations. We will also provide access to meeting recordings if sessions are virtual.

This process is meant to be agile and forward-looking, fully grounded in the realities of your personal situation and the marketplace, whatever they may be now and to the extent possible in the future.



READY FOR NEXT