The New Perspectives
EXIT READINESS FOCUS FRAMEWORK

FOR IT BUSINESS OWNERS

A practical framework to help you prepare yourself and your business for a potential future exit.

NEW PERSPECTIVES
BUSINESS COACHING

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USING THIS WORKBOOK

The New Perspectives EXIT READINESS FOCUS FRAMEWORK Workbook has been created to help IT business owners prepare themselves and their business for a potential future exit.

It will help you step back from the day-to-day, assess where you and your business are today, clarify the future you want, identify what may need to change and turn your priorities into focused action.

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Welcome to the EXIT READINESS FOCUS FRAMEWORK

For IT Business Owners Preparing for a Future Exit

You may not be ready to sell your business today. You may not even be certain that you ever will.

But if a future exit is something you're considering, preparing well in advance can give you more choices about what happens next.

The Exit Readiness FOCUS Framework is a practical five-stage process designed to help you step back from the day-to-day running of your business, assess where you and your business are today, clarify the future you want and identify what may need to change.

PAUSE → CLARIFY → PRIORITISE → COMMIT → PROTECT

PAUSE — Step back and create the space to think about your future and your business

CLARIFY — Understand where your business is today, where you want it to be and what may need to change before a potential future exit.

PRIORITISE — Decide which changes matter most and where your focus should go first.

COMMIT — Turn your priorities into a focused 90-day plan for action.

PROTECT — Protect the progress you're making, review what you've learned and decide what deserves your attention next.

The aim isn't to prepare your business for an immediate sale. It's to help you prepare yourself and build a stronger, less owner-dependent and more transferable business — giving you greater choice about what happens next.

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INTRODUCTION

If you're beginning to think about a future exit from your IT business, you don't need to have made the decision to sell.

You may be thinking two years ahead. It may be five years or more. Or perhaps the idea has only recently started to cross your mind.

That's enough to begin preparing.

Because preparing for a potential future exit isn't just about getting your business ready to sell.

It's about building a stronger business that gives you more choices about what happens next.

And that preparation starts long before you speak to a mergers and acquisitions (M&A) adviser, obtain a valuation or begin looking for a buyer.

It starts by understanding where you and your business are today.

You may already have many of the foundations of a strong business in place.

You may have a capable team, loyal customers, good financial performance and healthy recurring revenue.

But there may also be areas that could make a future exit more difficult.

Perhaps the business still depends heavily on you.

Perhaps you offer too many products or services, operate across too many markets or rely too heavily on a small number of customers.

Perhaps your processes, contracts or financial information need strengthening.

Or perhaps you already know what needs to change, but there are simply too many competing priorities demanding your attention.

Every business will be different.

The purpose of this workbook isn't to assume what's wrong with yours.

It's to help you step back, think about the future you want, assess where you are today and identify the areas that deserve your attention most.

I've been through this journey myself.

In 2004, together with two co-founders, I started an IT business from scratch. Over the next fifteen years, we grew the business to an eight-figure annual turnover before successfully selling it in 2019.

Getting the business into a position where it could be sold didn't happen overnight.

We had to prepare for it.

Over time, we strengthened the business in many of the areas you'll assess in this workbook.

We developed more repeatable and recurring revenue. We became more disciplined about our processes and documentation. We strengthened the team and transferred knowledge and responsibilities away from the owners. We standardised many of our customer arrangements and became clearer about the products, services and markets that mattered most.

And I gradually handed over customer relationships and responsibilities that had previously depended heavily on me.

Not everything was perfect. Along the way, we uncovered areas of the business that needed attention and, looking back, there are certainly things I would do differently.

But the experience taught me something important:

Preparing for a future exit is really about building a better business.

A business that is less dependent on you. A business with stronger people, processes and revenue. A business that somebody else could eventually own and operate successfully. And even if you ultimately decide not to sell, those are worthwhile things to build.

That's where FOCUS comes in.

Once you begin looking seriously at your business, you may uncover several things that could be improved. Trying to tackle everything at once is unlikely to be the answer.

The purpose of this framework is to help you understand where you are, get clear about where you want to be and decide what deserves your attention first.

You don't need to fix everything today. You need to know what matters most and start moving in the right direction.

Let's get started!

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WHERE THE EXIT READINESS FOCUS FRAMEWORK FITS

Selling a business is a process. But the work of preparing for a potential future exit should begin well before you appoint an M&A adviser or put the business on the market.

That's where the FOCUS Framework fits.

The framework is designed to help you step back, assess where you and your business are today, clarify your Desired Future and identify the changes that could make the business stronger, less dependent on you and better prepared for a potential future sale.

You may ultimately decide to sell. You may decide not to. Either way, the aim is to build a better business and give yourself more options.

THE BUSINESS MOMENTUM COACHING PROGRAMME

The Exit Readiness FOCUS Framework forms the foundation of my Business Momentum Coaching Programme.

The programme helps you take what you identify through the FOCUS Framework and turn it into deliberate action — working through your priorities, building momentum and making practical changes to your role and the business over time.

My role is to help you prepare yourself and your business for a potential future exit — not to broker or advise on the sale itself.

If and when you decide the time is right to explore a sale, the next stage is to bring in the appropriate professional advisers, which may include an M&A adviser, accountant and solicitor:

HOW TO GET THE MOST FROM THE EXIT READINESS FOCUS FRAMEWORK

The EXIT READINESS FOCUS FRAMEWORK Workbook is designed to help you step back, think clearly and make deliberate decisions about preparing yourself and your business for a potential future exit.

You don't need to have all the answers right now. Some questions may be straightforward. Others may highlight things you need to understand better or return to later.

As you work through **PAUSE — CLARIFY — PRIORITISE — COMMIT — PROTECT**, your thinking will gradually be distilled into a small number of important areas:

- Where you and your business are today
- The business areas that may need attention
- Your Desired Future
- Your Motivation
- The Business Priorities and who should own them
- Your Priority
- Your 90-Day Outcome
- Your Action Steps
- The other responsibilities you've consciously chosen to DO
- How you'll protect and regularly review your progress

At the end of the workbook, you'll bring these decisions together in your FOCUS PLAN:

MY FOCUS PLAN captures the key decisions you've made and what you're committing to during your next 90-day block.

At the end of each 90-day block, you'll step back, review your progress, reassess your Exit Readiness and decide what deserves your attention next.

The aim is to understand where you and your business are today, decide what matters most and focus your time, attention and resources on what will make the greatest difference.

NAVIGATING THE WORKBOOK

This workbook includes links to help you move quickly between sections as you work through the FOCUS Framework.

Return to Contents — at the bottom of each page, you'll find a link that takes you back to the Contents page, where you can jump directly to any stage or section of the workbook.

When you reach MY FOCUS PLAN, you'll also find links to help you bring together the thinking and decisions you've made throughout the five stages.

Revisit links take you back to the relevant section of the workbook, while **Go to FOCUS Plan** links return you to your plan.

As you complete your FOCUS Plan, you don't need to rewrite work you've already done. Where appropriate, you can simply **copy and paste** your answers, notes or key sentences from the relevant stage into your FOCUS Plan, editing or summarising them if needed.

This allows you to move easily between your original thinking and your FOCUS Plan as you bring your key decisions together in one place.

You don't need to keep returning to every exercise you've completed.

The workbook helps you **do the thinking**.

Your FOCUS PLAN helps you **keep that thinking visible and turn it into action**.

Work through the framework one stage at a time, give yourself the space to think honestly, and let each stage build on the one before it.

WHY FOCUS MATTERS

Running a successful IT business already involves making a constant stream of decisions.

Technology changes. Customer expectations evolve. New opportunities appear. People need your attention.

Competitors change direction. Suppliers introduce new products and services.

And alongside all of that, you still need to lead your team, serve your customers and move the business forward.

Now another thought has started to enter your thinking:

I might want to exit this business one day.

If you've never sold a business before, that thought can raise more questions than answers:

- Where do I start?
- How far in advance should I begin preparing?
- What would need to change in the business?
- What would need to change about my own role?
- How do I know what a potential buyer might value?
- What should I concentrate on first?

You may already have some ideas.

You may even have a clear picture of when you'd like to step away and what you'd like to do afterwards.

Or this may be the first time you've seriously started thinking about it.

Wherever you're starting from, preparing for a potential future exit requires choices.

There may eventually be several areas of the business that deserve your attention.

But you don't need to understand all of them yet — and you certainly don't need to tackle everything at once.

The first step is to create some space to think, understand where you are today and begin getting clearer about where you want to go.

That's why focus matters.

DECIDING WHAT DESERVES YOUR ATTENTION

Once you start thinking seriously about a potential future exit, it's easy to assume that you need to start changing everything.

You don't.

Your business may already have many strengths. And as you work through this framework, you may also identify areas that could be strengthened.

The challenge is deciding **what deserves your attention first**.

I learned this lesson while building our own IT business.

As the business grew, so did the number of opportunities available to us. Every customer conversation could uncover another possibility. Suppliers introduced new products. New markets looked attractive. There was always something else we could pursue.

Many of those opportunities were perfectly good ones.

But saying yes to one thing inevitably meant giving less attention to something else.

That's an important principle when preparing a business for a potential future exit.

You may eventually identify several things that could make your business stronger.

Perhaps some will be relatively straightforward to address. Others may require months or even years of work.

Trying to tackle everything at once is unlikely to help.

Focus isn't about working harder. Most business owners already work incredibly hard.

It's about becoming more deliberate about where you invest your time, attention and energy — and having the discipline to protect it.

Every new commitment comes at the expense of something else.

Every “yes” is also a “no” to something that may matter more.

That's why this framework won't simply help you identify what may deserve attention.

It will help you decide what matters most.

PREPARING FOR A FUTURE EXIT

If you're considering exiting your IT business at some point in the future, it's natural to wonder where to begin.

Your first thought might be:

"What is my business worth?"

That's an understandable question.

But before thinking about valuations, potential buyers or speaking to an M&A adviser, there is another question worth considering:

"What would need to change for this business to operate successfully without me?"

That question shifts the focus.

It moves you away from thinking about the eventual sale itself and towards the business you would need to build in order to be better prepared for one.

In my experience, much of the work involved in preparing our IT business for sale wasn't really about selling the business at all.

It was about making the business stronger.

We developed more repeatable and recurring revenue.

We became more disciplined about our processes and documentation.

We strengthened the team and transferred knowledge and responsibilities away from the owners.

We standardised many of our customer arrangements and became clearer about where we wanted to focus.

Over time, the business became less dependent on us.

And when we eventually entered discussions about selling the business, we discovered just how valuable that preparation had been.

The work we'd done helped make the business more attractive to potential buyers and, ultimately, to the company that acquired us.

We were also better prepared for the acquisition process itself, which helped us work through it and complete the sale within the timeframe we'd been working towards.

Looking back, one of the biggest lessons I took from the experience was that the work you do well before you decide to sell can have a significant influence on how prepared you are when that opportunity eventually arrives.

Preparing for a future exit is really about building a better business.

And that's valuable whether you eventually sell or not.

A stronger business can give you more options.

It may become easier to run, less dependent on you and better able to operate successfully without your constant involvement.

The question then becomes:

"Where do I begin?"

From my experience, the first step is to create the space to step back and think clearly.

1 - PAUSE

Create the space to think

Before you start making decisions about the future of your business, step away from your day-to-day demands and give yourself the time and space to think clearly.

Schedule a dedicated FOCUS Session in your diary and allow around three to four hours to work through this framework.

If possible, choose somewhere away from the office where you won't be interrupted.

Turn off your phone and email and remove as many distractions as possible.

This isn't about having all the answers or making every decision today.

It's an opportunity to step back and look objectively at where you and your business are today, where you want to be and what may need your attention.

As you work through the framework, you'll assess how prepared you and your business are for a potential future exit, clarify the future you want and decide where your focus should go next.

The decisions you make could shape the direction of your business for months — or even years — to come.

Give yourself the time and space to think properly and then move on to stage 2 - CLARIFY.

2 - CLARIFY

Understand where you are today and where you want to be

Before deciding what deserves your attention, you need a clear picture of where you and your business are today — and what you want the future to look like.

In this stage, you'll step back and consider both the business and yourself as its owner.

You'll explore:

- **What can make a business more attractive to a potential buyer** — and some of the areas that can strengthen or weaken exit readiness
- **Your Exit Readiness Assessment** — to help you take an objective look at where your business is today and identify areas that may need attention
- **Meet James** — in this section you'll meet James, a fictitious IT business owner who is beginning to think seriously about a potential future exit. You'll follow James through the FOCUS Framework to see how he applies it to his own business and circumstances
- **Your Desired Future** — what you want the business, your role and your life to look like in the years ahead
- **Your Motivation** — why that future matters to you and what is driving you towards it
- **Your Time & Attention** — where your time and attention are going today, and where they could make a greater difference as you prepare yourself and your business for a potential future exit

Your Desired Future gives you a destination.

Your Motivation gives you a reason to move towards it.

And understanding where your Time & Attention are going helps you begin creating the capacity to work on what matters most.

You don't need to have decided that you will sell your business yet.

The purpose of CLARIFY is to give you a clearer picture of where you are today, where you want to go and how your own role may need to evolve as you prepare for the future.

WHAT MAKES A BUSINESS EXIT-READY?

Preparing for a potential future exit isn't about making your business perfect.

Few businesses are.

It's about understanding the areas that could make your business stronger, less dependent on you and more attractive to a potential buyer — and then deciding which of those areas deserve your attention most.

Every business will be different. But there are some common areas worth considering.

Can the Business Run Without You?

A business that depends heavily on its owner for day-to-day decisions, customer relationships or sales can be difficult to step away from.

Do You Have the Right People and Structure?

The right people, in the right roles, with clear responsibilities and the confidence to make decisions, can reduce the business's reliance on you. The way your team is structured matters too — a clear, effective structure can help the business operate successfully without your constant involvement.

How Predictable Is Your Revenue?

Recurring and repeatable revenue can provide greater visibility and reduce the need to continually win new projects or bespoke work.

How Strong Is Your Customer Base?

A healthy spread of customers can reduce the impact of losing any one customer and make the business less vulnerable.

Can the Business Keep Growing Without You?

A repeatable way of generating opportunities and winning new customers means growth doesn't have to depend heavily on the owner.

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Do You Really Know Your Numbers?

Clear, reliable financial information helps you understand how the business is performing and where it makes its money.

How Well Documented Are Your Processes?

Clear, documented and consistently followed processes reduce reliance on knowledge held by particular people and make it easier for others to learn how the business operates.

Is It Clear What Your Business Does Best?

A clear focus on what the business does, who it serves and where it creates the most value can make it easier to understand — for customers, your team and a potential buyer.

Are There Any Hidden Risks?

Dependencies or unresolved issues involving key people, customers, suppliers, contracts, technology or legal matters can create problems later — particularly when a potential buyer begins looking more closely at the business.

You may already be strong in some of these areas. Others may need attention.

You don't need to decide what to do about them yet.

The next step is to take a closer look at your own business and consider where you stand across each of these nine areas.

That's what you'll next do in your Exit Readiness Assessment.

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YOUR EXIT READINESS ASSESSMENT

You've just explored nine areas that can influence how prepared a business is for a potential future exit.

Now it's time to look at your own business.

This isn't a valuation.

It isn't an audit.

And it isn't intended to tell you whether your business is ready to sell.

It's a practical way to look at how strong the business is today and identify areas that could be improved well before you decide to pursue a potential sale.

From my own experience of preparing and ultimately selling an IT business, strengthening these areas can help you build a stronger business that is less dependent on you — and put you in a much better position if and when you decide to explore an exit.

Over the next few pages, you'll return to each of the nine areas and consider where your business stands today.

For each area, you'll be given five statements, numbered 1 to 5.

Choose the statement that most closely describes your business as it is today — not where you'd like it to be — and record that number as your current position.

Don't overthink your answers. There may not be a perfect fit. Simply choose the statement that feels closest to your current position.

You may discover that some areas are already strong. Others may need more attention. You may even identify something you haven't really considered before.

The aim isn't to score 5 in every area.

Few businesses will be equally strong across all nine areas — and they don't need to be.

The purpose is to build a clearer picture of your business today and identify where it could become stronger.

You're looking for potential improvements that could make the business stronger and better prepared for a future exit — not trying to make it perfect.

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1. CAN THE BUSINESS RUN WITHOUT YOU?

Think about how dependent the business is on you today.

Which of the following statements most closely describes your current position?

1 — The business depends heavily on me

I'm involved in most important decisions, and key customer relationships, sales or day-to-day operations rely heavily on me.

2 — I've started to step back, but I'm still central

Some responsibilities sit with other people, but I'm still regularly needed to make decisions, solve problems or keep important things moving.

3 — The business can operate without me for periods of time

My team handles much of the day-to-day operation, although there are still important areas, relationships or decisions that depend on me.

4 — The business operates largely without my involvement

Most responsibilities and important relationships have been transferred to the team. I can step away without significantly disrupting the business.

5 — The business is not dependent on me

The business can operate successfully for an extended period without my day-to-day involvement. Responsibilities, decision-making and key relationships sit within the business rather than with me personally.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position:

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about decisions or responsibilities that could be handed over, customer relationships that could be shared with others, or areas where the business still relies too heavily on your knowledge or involvement.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine. You don't need to create an action simply for the sake of it.

2. DO YOU HAVE THE RIGHT PEOPLE AND STRUCTURE?

Think about whether you have the right people, in the right roles, with a structure that allows the business to operate effectively without your constant involvement.

Which of the following statements most closely describes your current position?

1 — The business relies heavily on me to hold the team together

There are significant gaps in the team, roles or responsibilities are unclear, and I regularly need to step in to make decisions, solve problems or keep things moving.

2 — We have a team, but there are some important weaknesses

Some people are in the right roles, but there are performance gaps, unclear responsibilities or structural issues. I still need to get involved frequently to make sure things happen.

3 — We have a reasonably capable team and structure

Most people are effective in their roles and responsibilities are reasonably clear. However, there are still areas where the business needs stronger capability, clearer accountability or a better structure.

4 — We have the right people in most of the right roles

Responsibilities and accountability are clear, people are trusted to make decisions, and the structure allows the business to operate effectively with limited involvement from me.

5 — The business has a strong team & structure that doesn't depend on me

We have the right people in the right roles, with clear responsibilities, accountability and decision-making throughout the business. The structure supports the business and the team can operate successfully for an extended period without my involvement.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position: ☐

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about whether you have the right people in the right roles, whether responsibilities and accountability are clear, where capability or performance could be strengthened, or whether the structure itself could work better.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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3. HOW PREDICTABLE IS YOUR REVENUE?

Think about how much confidence you have in the revenue the business is likely to generate in the months ahead.

Which of the following statements most closely describes your current position?

1 — Most of our revenue has to be won again and again

Revenue depends heavily on continually finding new customers, winning new projects or securing one-off work. There is little recurring or repeatable revenue.

2 — We have some repeat business, but revenue is still difficult to predict

Some customers return or buy from us regularly, but a significant proportion of our revenue still depends on winning new or bespoke work.

3 — We have a reasonable base of recurring and repeatable revenue

A meaningful proportion of our revenue comes from existing customers, contracts or services that are likely to continue, although there is still room to make revenue more predictable.

4 — Most of our revenue is recurring or repeatable

We have a strong base of recurring contracts, managed services, software licensing or other repeatable revenue, giving us good visibility of future income.

5 — Our revenue is highly predictable

The business has a strong and established base of recurring and repeatable revenue. We have clear visibility of future income and are not heavily reliant on continually winning one-off or bespoke work.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position:

What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about opportunities to increase recurring or repeatable revenue, make more existing customer relationships longer term, reduce reliance on one-off or bespoke work, or make future revenue easier to predict.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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4. HOW STRONG IS YOUR CUSTOMER BASE?

Think about how strong and well spread your customer base is, and how much the business depends on a small number of customers or relationships.

Which of the following statements most closely describes your current position?

1 — We rely heavily on a small number of customers

A significant proportion of our revenue comes from one or two customers. Losing a major customer could have a serious impact on the business, and some important relationships may depend heavily on me personally.

2 — We have a reasonable customer base, but there are still some significant dependencies

We have a reasonable number of customers, but a few account for a large proportion of revenue. Some key relationships are still closely tied to me or another individual.

3 — We have a reasonably strong and established customer base

Revenue is spread across a good number of customers and we have some long-standing relationships and repeat business. There are still some customer dependencies or relationships that could be strengthened or shared more widely within the business.

4 — We have a strong and well-spread customer base

We have a healthy mix of customers, strong relationships and good levels of repeat business. No single customer creates a significant dependency, and most important relationships extend beyond one individual.

5 — Our customer base is a clear strength of the business

Revenue is well spread across a broad and established customer base. We have strong, long-standing relationships, good levels of repeat business and customer relationships that belong to the business rather than depending on particular individuals.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position:

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about reducing reliance on one or two major customers, strengthening relationships with existing customers, creating opportunities for more repeat business, or making sure important customer relationships aren't dependent on you or one other person.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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5. CAN THE BUSINESS KEEP GROWING WITHOUT YOU?

Think about how the business generates new opportunities and wins new customers — and how dependent that is on you personally.

Which of the following statements most closely describes your current position?

1 — New business depends heavily on me

I generate most of our new opportunities and play a central role in winning new customers. If I stepped away, new business would be significantly affected.

2 — Other people are involved, but I still drive most new business

Some opportunities come through other people or channels, but I remain heavily involved in generating leads, building relationships and winning new customers.

3 — We have some ways of generating new business without me

The business has other people, relationships or marketing and sales activity that generate opportunities, but I still play an important role in keeping new business moving.

4 — Most new business can be generated and won without me

We have established ways of generating opportunities and winning new customers, with other people taking responsibility for much of the sales and marketing activity. My involvement is limited.

5 — New business does not depend on me

The business has established and repeatable ways of generating opportunities and winning new customers. Responsibility sits within the business, and new business can continue successfully without my involvement.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position: ☐

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about ways to generate new opportunities without relying on you, sharing or transferring sales relationships, giving other people greater responsibility for winning new business, or developing a more consistent and repeatable approach to sales and marketing.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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6. DO YOU REALLY KNOW YOUR NUMBERS?

Think about how clearly you understand the financial performance of the business, where it makes its money and how confidently you can explain the numbers.

Which of the following statements most closely describes your current position?

1 — I don't have a clear picture of our financial performance

I have a general sense of how the business is doing, but financial information may be limited, out of date or difficult to interpret. I couldn't easily explain where the business makes or loses money.

2 — I understand the headline numbers, but there are important gaps

I regularly see basic financial information such as revenue and profit, but I don't have a clear enough view of performance across different customers, services or areas of the business.

3 — We have reasonably good financial visibility

We have reliable financial information and understand the overall performance of the business. However, there are still areas where better reporting or greater insight would help us understand what's really driving performance.

4 — We have a strong understanding of our financial performance

Our financial information is reliable and up to date. We understand revenue, profitability and the performance of the main areas of the business, and use this information to make decisions.

5 — Our financial information gives us a clear picture of the business

We have accurate, timely and well-organised financial information. We understand where revenue and profit come from, how the different parts of the business perform and can clearly explain the financial performance of the business.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position: ☐

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about improving the quality or timeliness of your financial information, understanding profitability by customer or service, producing clearer management information, or making it easier to see and explain what's really driving the financial performance of the business.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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7. HOW WELL DOCUMENTED ARE YOUR PROCESSES?

Think about the important processes that keep your business running. How clearly are they documented, how consistently are they followed, and how easy would it be for someone new to learn how things should be done?

Which of the following statements most closely describes your current position?

1 — Most of our important processes are held in people's heads

There is little formal documentation of how important tasks should be carried out. We rely heavily on individual knowledge and experience, and losing a key person could create significant disruption.

2 — Some processes are documented, but much still relies on individual knowledge

We have documented some ways of working, but there are important gaps. People often rely on experience or ask particular individuals how things should be done.

3 — Many of our important processes are documented

We have reasonably clear processes across much of the business, although there are still gaps or areas where documentation could be improved. Some important knowledge still sits with particular people.

4 — Most of our important processes are clearly documented and followed

We have clear and accessible processes across most important areas of the business. People generally work consistently, and new team members can learn how things should be done without relying heavily on particular individuals.

5 — Our processes are well documented, consistently followed and easy to transfer

The business has clear and accessible processes for its key activities. They are understood and consistently followed, making it easier for people to take on responsibilities, learn new tasks and maintain consistent standards without relying on individual knowledge.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position:

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about important processes that aren't currently documented, knowledge that sits with particular people, areas where tasks are carried out differently depending on who does them, or how easy it would be for someone new to learn how things should be done.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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8. IS IT CLEAR WHAT YOUR BUSINESS DOES BEST?

Think about how clearly focused your business is on what it does, who it serves and where it creates the most value.

Which of the following statements most closely describes your current position?

1 — We do many different things for many different types of customers

Our services have developed over time, often in response to individual customer needs. It can be difficult to explain simply what the business does best or where its strongest focus lies.

2 — We have some areas of focus, but our offering is still quite broad

We know which services and customers are important to us, but we still provide a wide range of services or bespoke solutions. Our proposition isn't always as clear as it could be.

3 — We have a reasonably clear focus

We have a good understanding of our core services, the customers we serve and where we create value. However, there are still parts of the business that sit outside that focus or could be simplified.

4 — We have a clear and focused proposition

Our core services and target customers are clearly defined. Most of what we do fits that focus, and customers and our team can readily understand where the business creates value.

5 — The business has a strong and clearly defined focus

We are very clear about what we do best, who we serve and where we create the most value. Our services, customers and activities are strongly aligned with that focus, making the business straightforward to understand.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position: ☐

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

What could the business change, improve or put in place?

You might think about whether the business could become more focused on its strongest services or customers, simplify or reduce services that no longer fit, reduce bespoke work, or make it clearer what the business does best and where it creates the most value.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.

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9. ARE THERE ANY HIDDEN RISKS?

Think about dependencies or unresolved issues involving key people, customers, suppliers, contracts, technology or legal matters that could create problems later — particularly if a potential buyer began looking more closely at the business.

Which of the following statements most closely describes your current position?

1 — There are significant risks or unresolved issues we haven't properly addressed

There are important areas of the business where we know there are unresolved issues, significant dependencies or potential risks. These could include contractual, legal, people, customer, supplier or technology-related matters.

2 — We understand some of our risks, but there are important gaps

We are aware of several areas of risk, but there may still be dependencies or unresolved issues involving people, customers, suppliers, contracts, technology or legal matters that need attention.

3 — We have a reasonable understanding of our main business risks

Most significant risks and dependencies are understood, including any known contractual or legal matters, although there are still some areas that could be investigated, documented or strengthened.

4 — Our main risks and dependencies are well understood and managed

We have good visibility of the significant risks within the business and have taken steps to reduce or manage them. Contractual, legal and other important matters are understood, with few significant unresolved issues.

5 — We have a strong understanding of our risks and few significant unresolved issues

The business regularly identifies and manages its important risks and dependencies. Key arrangements are well documented, contractual and legal matters are in good order, and there are no significant known issues that have been left unresolved.

Choose the statement that most closely reflects the business as it is today and enter the number in the box below:

Your current position:

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What could improve?

Based on your assessment, think about what could make the business stronger in this area.

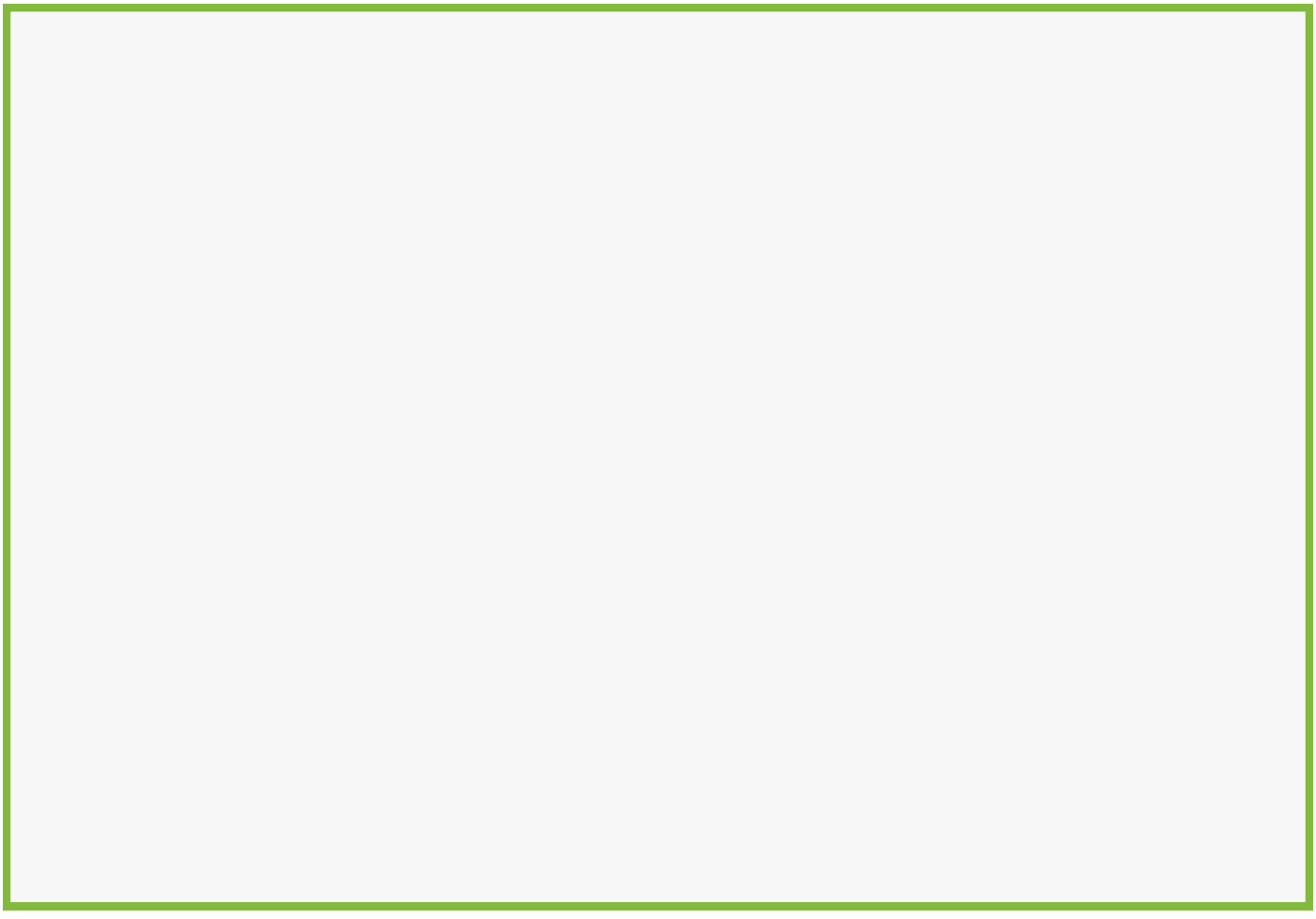
What could the business change, improve or put in place?

You might think about dependencies on key employees, customers or suppliers; contracts or agreements that need reviewing; unresolved legal matters; intellectual property or ownership issues; employment arrangements; technology or systems the business relies heavily on; or other risks that could become important if a potential buyer looked more closely at the business.

Don't worry yet about whether everything needs to be done, how difficult it might be or when you would do it. Simply capture anything that could strengthen the business in this area.

Or, no action needed?

If you're already strong in this area and don't believe anything currently needs your attention, that's fine.



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What Happens Next?

You've now considered your business across nine areas that can influence its readiness for a potential future exit.

Don't try to prioritise everything you've identified yet.

You'll return to your assessment later in the EXIT READINESS FOCUS Framework, when you'll bring together the areas that may deserve attention and decide what matters most.

Before you continue with your own thinking, let’s meet James — a fictional IT business owner who’ll help illustrate how the framework works in practice.

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MEET JAMES

To see how the FOCUS Framework works in practice, let's introduce James — a fictitious IT business owner who we'll follow through the five stages.

James owns an established IT services business with a team of 25 people.

The business is successful. It has a strong customer base, healthy recurring revenue and has grown steadily over the years.

But James has started thinking seriously about what he wants from the next few years.

He isn't ready to sell the business today, and he hasn't made a firm decision that he will sell. But a potential future exit is becoming a real possibility.

Ideally, he'd like to spend the next year or two getting himself and the business into a position where, if the timing and circumstances are right, he has the option to sell.

James also knows the business isn't quite ready for that yet.

He's still heavily involved in some important decisions, customer relationships and new business. There are areas where the team could take greater responsibility, and some parts of the business have developed over time without necessarily being part of a deliberate plan.

So James decides to use the FOCUS Framework to pause, step back and look objectively at where the business is today and what may need to change.

Like you, his starting point is the **Exit Readiness Assessment**.

He works through each of the nine areas, chooses the statement that most closely reflects his business today and considers:

What could improve?

Here's what he identifies.

JAMES'S EXIT READINESS ASSESSMENT

James's assessment confirms that the business already has some strong foundations.

But it also highlights several areas that could become important if he wants to prepare himself and the business for a potential future exit:

Area	Current position	What could improve?
1. Can the business run without you?	2	Transfer more day-to-day decisions and responsibilities to the management team and reduce James's involvement in key customer relationships.
2. Do you have the right people and structure?	3	Clarify responsibilities within the management team and strengthen capability in key areas so more decisions can be made without James.
3. How predictable is your revenue?	4	Continue increasing recurring managed-service and software revenue and reduce reliance on one-off project work.
4. How strong is your customer base?	4	**No significant action needed at present.** Customer revenue is reasonably well spread and relationships are established across the business.
5. Can the business keep growing without you?	2	Develop a more repeatable sales approach and transfer more responsibility for generating and winning new business away from James.
6. Do you really know your numbers?	4	**No significant action needed at present.** Financial information is reliable, with good visibility of revenue, profitability and business performance.
7. How well documented are your processes?	3	Document the remaining important processes and reduce reliance on knowledge held by particular individuals.
8. Is it clear what your business does best?	3	Simplify the service portfolio, reduce lower-value bespoke work and become clearer about the core services and customers the business wants to focus on.
9. Are there any hidden risks?	4	Review older customer and supplier agreements and ensure key contractual and employment documentation is up to date.

James doesn't need to act on everything he's identified. **And these aren't his Business Priorities yet.**

For now, the assessment has simply given him a clearer picture of where the business is today and the areas that could make it stronger.
Your next step is to get clear about your Desired Future.

YOUR DESIRED FUTURE

You've looked objectively at where your business is today.

Now think about where you want to be.

If you're seriously considering a future exit, your Desired Future isn't simply “sell the business.”

It's about getting clear on what you would like the next few years to look like — for the business and for you.

Ask yourself:

“If I were preparing to exit my business within the next two to three years, what would I want the business, my role and the eventual exit to look like?”

Think about:

- How strong and independent of you would you want the business to become?
- When would you ideally like to be in a position to sell?
- What role would you want to have in the business as you prepare?
- After a sale, how long would you be prepared to remain involved — six months, a year, or perhaps not at all?
- What would you want your role and involvement to look like during that transition?
- What would you like life after the business to make possible?

You don't need to know exactly when or how you will sell. And circumstances may change. For now, describe the future you would ideally like to work towards using the next page.

MY DESIRED FUTURE:

↓ Go to FOCUS Plan

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JAMES'S DESIRED FUTURE

James has now looked objectively at where his business is today.

Next, he thinks about where he would ideally like to be over the next two years — both for the business and for himself.

He writes:

MY DESIRED FUTURE

Over the next two years, I want to build a stronger business that can operate successfully without depending on me day to day.

I want the management team to take greater responsibility, reduce my involvement in key customer relationships and new business, and put the business in a position where I have the option to sell if the timing and circumstances are right.

If I do sell, I would be prepared to remain involved for a transition period, but ideally no longer than 12 months.

After that, I want the freedom to step away completely and decide what I want to do next.

James now has a clearer picture of the future he's working towards.

But there's another important question: why does that future matter to him?

YOUR MOTIVATION

You've described the future you'd ideally like to work towards.

Now think about why that Desired Future matters to you personally.

Ask yourself:

"What will achieving my Desired Future give me?"

Then go a little deeper and ask:

"Why is that important to me?"

Try to look beyond the business outcomes themselves.

Perhaps it's about greater freedom, more time with your family, financial security, less pressure, the opportunity to pursue something new, greater choice about what you do next — or something entirely different.

There is no right answer. What's important is identifying the reason that matters most to you.

Below, capture what achieving your Desired Future would give you — and why that matters.

MY MOTIVATION:

↓ Go to FOCUS Plan

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JAMES'S MOTIVATION

James has described the future he'd ideally like to work towards.

Now he asks himself the same two questions.

"What will achieving my Desired Future give me?"

For James, it would give him greater freedom and choice.

He'd be able to step away from the constant pressure of day-to-day operations, spend more time with his family and enjoy life outside the business without always feeling that the company needed him.

Then he asks:

"Why is that important to me?"

James realises that he doesn't want to spend the next few years becoming even more deeply tied to the business he's built.

He wants to know that the business can succeed without depending on him — giving him the freedom to decide when the time is right to step away and what he wants to do next.

He writes:

MY MOTIVATION

To create greater freedom and choice for myself and my family, knowing I've built a strong business that can succeed without depending on me.

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YOUR TIME & ATTENTION

Preparing your business for a potential future exit will require more than identifying what needs to change.

It will also require **your time and attention**.

From my own experience of preparing an IT business for sale, I know that **the owner's role can begin to change**. Alongside running the business, you may need to spend more time strengthening the areas that will make it less dependent on you and better prepared for a potential future exit.

That might mean developing your management team, transferring customer relationships, strengthening processes, improving recurring revenue or addressing other areas you've identified through your Exit Readiness Assessment.

It's helpful to think of exit preparation as a project in its own right.

And like any important project, it needs time.

But if your working week is already filled with operational issues, meetings, customer queries and decisions that others could potentially make, finding that time can be difficult.

So before deciding what your Business Priorities should be, take a step back and look at where your time and attention are going today.

The aim isn't simply to become more productive.

It's to create the capacity to focus on the changes that could make you and your business better prepared for a potential future exit.

Think about a typical working week.

Ask yourself:

"What activities, responsibilities and demands currently consume my time and attention as the business owner?"

Include both the things you deliberately choose to do and the things you regularly find yourself being drawn into.

Don't worry yet about whether you should be doing them.

For now, simply create an honest picture of where your time and attention are going today.

Capture them in MY TIME & ATTENTION LIST on the next page.

MY TIME & ATTENTION LIST:

JAMES LOOKS AT HIS TIME & ATTENTION

James thinks about what typically consumes his working week.

He writes:

MY TIME & ATTENTION LIST

- *Responding to customer issues and escalations*
- *Answering questions from employees*
- *Attending management and operational meetings*
- *Getting involved in technical and operational problems*
- *Reviewing and approving quotes and proposals*
- *Supporting larger sales opportunities*
- *Maintaining relationships with key customers*
- *Dealing with recruitment and people issues*
- *Reviewing financial and business performance*
- *Working with suppliers and technology partners*
- *Responding to emails, messages and administration*
- *Making decisions that others regularly bring to him*
- *Stepping in when something isn't getting done*
- *Working on longer-term business strategy*

Looking at his list, James can see how much of his time and attention is still being consumed by the day-to-day operation of the business.

Some of these activities genuinely need his involvement. **Others may not.**

More importantly, he realises that very little of his working week is currently dedicated to preparing himself and the business for the future he's described.

For now, James doesn't decide what to delegate, stop doing or spend more time on.

He simply recognises that if he wants to prepare seriously for a potential future exit, where he spends his time and attention may need to change.

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3 - PRIORITISE
CHOOSE WHAT MATTERS MOST

You've now created a clearer picture of where your business is today, the future you'd like to work towards and where your own time and attention are currently going.

Your **Exit Readiness Assessment** may have identified several areas where your business could become stronger.

You don't need to work on everything at once.

In fact, trying to make progress on too many things at the same time can make it harder to make meaningful progress on any of them.

Prioritisation is about making deliberate choices about what deserves attention now — and what can wait.

In this stage, you'll:

- **Choose your Business Priorities** — using your Desired Future as a filter to decide which areas deserve attention now and who should take ownership of them
- **Consider the 4 Ds** — a simple approach you can use to think about what business activities you should DO, DELEGATE, DELAY or DELETE
- **Reconsider your Time & Attention** — to begin creating the capacity to focus on the changes that could make the greatest difference
- **Choose Your Priority** — the one area where your own time, attention and involvement can make the greatest difference towards your Desired Future

You'll also continue to follow **James** and see how he applies these ideas to his own business and circumstances.

You may identify more than one area that matters.

That's okay.

Your business can have several Business Priorities, each owned by different people.

Your Priority is where you deliberately choose to place your own primary focus.

The purpose of PRIORITISE is to help you decide what deserves attention now, who should take ownership and where **your own time and attention** can make the greatest difference.

CHOOSING YOUR BUSINESS PRIORITIES

Your Exit Readiness Assessment helped you identify areas where your business could become stronger.

Now you need to decide which of those areas deserve attention first.

Return to the improvements you identified and consider:

"Which of these would make the greatest difference in moving my business towards my Desired Future?"

You may identify several things that could improve.

But your business has a limited amount of time, attention and capacity available to make them happen.

The aim is therefore to choose the **fewest Business Priorities** your business needs to focus on now.

If you have a team, consider who has the capability and capacity to take ownership of each priority. You don't need to personally own everything that matters.

I suggest choosing no more than three Business Priorities at any one time.

For each Business Priority, identify **one clear owner** who will be responsible for moving it forward.

You may personally own one of them. Others may be better owned by someone else within the business.

The important thing is that you've deliberately chosen what deserves attention now — and what can wait.

MY BUSINESS PRIORITIES

Return to the improvements you identified through your **Exit Readiness Assessment**.

Using your Desired Future as your filter, decide which few areas deserve attention now.

For each one, rank its priority (e.g. 1, 2, 3 etc.) and identify who should take ownership of moving it forward.

Remember, you don't need to personally own every Business Priority.

BUSINESS PRIORITY	PRIORITY #	OWNER

↓ Go to FOCUS Plan

[Here's some additional space for you]

BUSINESS PRIORITY	PRIORITY #	OWNER

↓ Go to FOCUS Plan

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CREATING CAPACITY — THE 4 Ds

You've identified the Business Priorities that deserve attention.

But preparing yourself and your business for a potential future exit will require time and attention alongside the day-to-day demands of running the business.

That may mean making some deliberate choices about where your time currently goes.

One simple approach I've found useful — both in my own business and with coaching clients — is the **4 Ds**:

DO — This genuinely requires my time, attention or involvement.

DELEGATE — This still needs to happen, but someone else could take ownership of it.

DELAY — This may still be important, but it doesn't need my attention right now.

DELETE — This no longer deserves my time or attention.

The 4 Ds are simply a tool to help you think.

If you already have another approach that works well for you, use that instead.

Shortly, you'll return to the Time & Attention List you created in Stage 2 and consider each item.

Ask yourself:

"Does this genuinely require my time, attention or involvement?"

The objective isn't to remove yourself from the business or delegate everything.

It's to make deliberate choices about where your involvement adds the most value — and begin creating the capacity to focus on the changes that could make you and your business better prepared for a potential future exit.

MY TIME & ATTENTION

Now, return to the **Time & Attention List** you created in Stage 2.

Using the 4 Ds — or another approach that works for you — consider what you want to **DO, DELEGATE, DELAY or DELETE**.

For anything you choose to delegate, identify who could take ownership.

Remember, the aim isn't to remove yourself from the business.

It's to begin creating the capacity to focus your time and attention where they can make the greatest difference towards your **Desired Future**.

TIME & ATTENTION ITEM	DECISION	OWNER

↓ Go to FOCUS Plan

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[Here's some additional space for you]

TIME & ATTENTION ITEM	DECISION	OWNER

↓ Go to FOCUS Plan

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CHOOSING YOUR PRIORITY

You've now identified your Business Priorities and considered how your own **Time & Attention** may need to change.

Your business may have several Business Priorities, owned by different people.
But as the business owner, **you have limited time and attention**.

Choosing one Priority gives you a clear answer to an important question: **when you're working on moving the business towards your Desired Future, where should your primary focus go?**

This doesn't mean ignoring everything else. You'll continue to have responsibilities, decisions and other areas that require your involvement.

But they don't all need to compete equally for your focus.

Your Priority doesn't necessarily need to be the number-one Business Priority. It may be any of the Business Priorities where your involvement can make the greatest difference — or something else that directly supports the direction you're trying to take the business.

Return once again to your **Desired Future** and ask yourself:

"Given my Desired Future, where will my time, attention and involvement make the greatest difference?"

This is **Your Priority**.

It doesn't need to be something you can complete quickly. It may remain important for several months or longer.

For now, simply make one deliberate choice about where your involvement can make the greatest difference.

MY PRIORITY:

↓ Go to FOCUS Plan

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JAMES DECIDES HIS BUSINESS PRIORITIES

James takes some time to look back over the **nine areas of his Exit Readiness Assessment**. He can see opportunities to strengthen the business across several of them. But he knows that trying to address everything at once is unlikely to help him make meaningful progress.

Given his **Desired Future**, James feels that four areas deserve particular attention right now:

1 — Can the Business Run Without You?

2 — Do You Have the Right People and Structure?

3 — How Predictable Is Your Revenue?

7 — How Well Documented Are Your Processes?

The first two are closely connected. James believes that strengthening his management team and transferring more responsibility away from himself could help address both.

He therefore turns these four areas into **three Business Priorities**:

BUSINESS PRIORITY 1

Strengthen the management team so more decisions and responsibilities can be handled without me

Owner: Me (James)

BUSINESS PRIORITY 2

Increase recurring managed-service and software revenue and reduce reliance on one-off project work

Owner: Sales Director

BUSINESS PRIORITY 3

Improve and document important operational processes and reduce reliance on knowledge held by particular individuals

Owner: Operations Lead

JAMES RECONSIDERS HIS TIME & ATTENTION

Now that James has identified his **Business Priorities**, he returns to the **Time & Attention List** he created in Stage 2.

He uses the **4 Ds** to think more deliberately about where his involvement is really needed and where others could take greater ownership.

He writes:

TIME & ATTENTION ITEM	DECISION	OWNER
Responding to customer issues and escalations	**DELEGATE**	Operations Lead
Answering questions from employees	**DELEGATE**	Management Team
Attending management and operational meetings	**DO**	Me
Getting involved in technical and operational problems	**DELEGATE**	Operations Lead
Reviewing and approving quotes and proposals	**DELEGATE**	Sales Director
Supporting larger sales opportunities	**DELEGATE**	Sales Director
Maintaining relationships with key customers	**DELEGATE**	Appropriate team members
Dealing with recruitment and people issues	**DELEGATE**	Management Team
Reviewing financial and business performance	**DO**	Me
Working with suppliers and technology partners	**DELEGATE**	Appropriate team members
Responding to emails, messages and administration	**DELEGATE**	Where appropriate
Making decisions that others regularly bring to me	**DELEGATE**	Management Team
Stepping in when something isn't getting done	**DELETE**	—
Working on longer-term business strategy	**DO**	Me

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JAMES REFLECTS ON HIS DECISIONS

Looking at his completed list, James can see that many of the activities consuming his time don't necessarily require his personal involvement.

But DELEGATE doesn't simply mean handing something over and forgetting about it.

James has a team of 25 people, so he can begin transferring greater responsibility to the people best placed to take it.

For example, rather than personally maintaining every key customer relationship, James can identify the right person within the business to take greater ownership of each relationship.

Depending on the customer, that might be someone within the sales team or another senior member of the business.

The same applies to suppliers and technology partners. James doesn't need to personally manage every relationship. He can decide which relationships genuinely require his involvement and which could be owned by other appropriate members of the team.

His email, messages and administration require a slightly different approach.

Some communications will still genuinely need James's attention. Others could be handled by somebody else, dealt with differently or may not require his involvement at all.

That's why James has written **“Where appropriate”** rather than simply assigning everything to one person.

James also notices that he hasn't placed anything under DELAY.

That's okay.

The 4 Ds aren't four boxes that all need to be filled. They're simply a tool to help make deliberate choices.

If James had identified something worthwhile that didn't deserve attention right now, he could have chosen to DELAY it and return to it later.

Looking at the exercise as a whole, James isn't trying to remove himself from the business overnight.

He's beginning to make deliberate choices about where his involvement adds the most value — and where other people can take greater ownership.

That starts to create the capacity he needs to work on the future of the business, rather than continually being drawn back into its day-to-day operation.

JAMES CHOOSES HIS PRIORITY

James has now identified his Business Priorities and thought carefully about where his own Time & Attention are going.

His business has several things it needs to work on.

But James now asks himself the same question:

"Given my Desired Future, where will my time, attention and involvement make the greatest difference?"

For James, the answer is clear.

He believes that strengthening his management team will help reduce the business's dependence on him, allow other people to take greater responsibility and create more capacity for him to work on the future of the business.

It also directly supports the Desired Future he described earlier: building a stronger business that can operate successfully without depending on him day to day.

James writes:

MY PRIORITY:

Strengthen the management team so more decisions and responsibilities can be handled without me.

This is also **James's Business Priority 1**, but it doesn't have to work that way.

Your Priority is simply the area where you believe your own time, attention and involvement can make the greatest difference towards your Desired Future.

James now knows where he wants to focus.

The next step is to turn that Priority into deliberate action.

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4 - COMMIT
Turn your priority into deliberate action

You've decided where your time, attention and involvement can make the greatest difference.

Now it's time to turn that **Priority** into deliberate action.

Some priorities may take many months — or even years — to fully address.

Instead of trying to tackle everything at once, focus on the meaningful progress you want to make next.

In this stage, you'll:

- **Define your 90-Day Outcome** — the meaningful progress you want to make towards your Priority over the next 90 days
- **Identify your Action Steps** — the practical steps that will help you move towards that outcome
- **Make space for the work** — so your Priority doesn't continually get pushed aside by the day-to-day demands of running the business

You'll also continue to follow **James** and see how he turns his Priority into deliberate action. The aim isn't to create a detailed project plan.

It's simply to get clear about **what meaningful progress looks like, what you'll do next and how you'll create the time to do it.**

Your Priority gives you the focus.

COMMIT turns that focus into action.

DEFINE YOUR 90-DAY OUTCOME

You've chosen your **Priority** — the area where you've decided your own time, attention and involvement can make the greatest difference.

Now decide what meaningful progress you want to make towards it over the next 90 days.

Your Priority may take much longer than 90 days to fully address.

That's okay.

The purpose of a **90-Day Outcome** isn't necessarily to complete your Priority. It's to give you a clear and meaningful point of progress to work towards over the next three months.

Ask yourself:

"What meaningful progress do I want to make towards my Priority over the next 90 days — and what will I have achieved?"

Be as specific as you can.

Your Priority describes **where you want to focus**.

Your 90-Day Outcome describes **what you intend to achieve as a result of that focus over the next 90 days**.

Think of your 90-Day Outcome as the next meaningful point of progress on the journey towards your Priority.

MY 90-DAY OUTCOME

Return to the **Priority** you chose in Stage 3.

Write it below, then decide what meaningful progress you want to have made towards it over the next 90 days.

MY PRIORITY: (AS DETERMINED DURING STAGE 3)

↓ Go to FOCUS Plan

MY 90-DAY OUTCOME:

↓ Go to FOCUS Plan

JAMES DEFINES HIS 90-DAY OUTCOME

James returns to the **Priority** he chose in Stage 3:

MY PRIORITY:

Strengthen the management team so more decisions and responsibilities can be handled without me.

He knows this won't be achieved completely within 90 days.

Strengthening the management team and reducing the business's dependence on him will take time.

So rather than trying to solve everything at once, James asks himself:

"What meaningful progress do I want to make towards my Priority over the next 90 days — and what will I have achieved?"

He decides that, over the next 90 days, he wants to begin transferring greater responsibility to his existing management team and become clearer about any gaps in the structure.

He writes:

MY 90-DAY OUTCOME:

By the end of the next 90 days, I will have clarified the responsibilities and decision-making authority of my existing management team, transferred several day-to-day decisions I currently make to them, and identified any significant gaps in management capability or structure that still need to be addressed.

James isn't expecting the business to operate independently of him after 90 days.

But if he achieves this outcome, he will have made meaningful progress towards reducing the business's dependence on him and towards his Desired Future.

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IDENTIFY YOUR ACTION STEPS

You've defined the **90-Day Outcome** you want to work towards.

Now consider the practical steps that could help you achieve it.

Ask yourself:

"What are the most important actions I need to take to move towards my 90-Day Outcome?"

You don't need to identify every possible action or plan the entire 90 days in detail.

Focus on the steps that you believe will make the greatest difference.

Some may be actions you need to take yourself. Others may involve members of your team or require somebody else to take ownership.

Your Action Steps may also change as you make progress and learn more.

The aim is simply to turn your 90-Day Outcome into a practical set of actions you can begin working on.

Where it helps, consider the order in which these actions need to happen — some may naturally need to come before others.

MY ACTION STEPS:

↓ Go to FOCUS Plan

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↑ Return to Contents

[Here's some additional space for you]

MY ACTION STEPS:

↓ Go to FOCUS Plan

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JAMES IDENTIFIES HIS ACTION STEPS

James now has a clear **90-Day Outcome**. He knows what meaningful progress would look like. Now he considers the practical actions that could help him achieve it.

He asks himself:
"What are the most important actions I need to take to move towards my 90-Day Outcome?"

James doesn't try to plan every detail of the next 90 days. Instead, he identifies the actions that he believes will make the greatest difference. He also considers the order in which some of them may need to happen.

He writes:

MY ACTION STEPS:

1. Review the current responsibilities of each member of the management team and identify where responsibilities or decision-making authority are unclear.

2. Meet individually with each member of the management team to understand where they feel confident taking greater ownership and where they may need further support.

3. Identify the day-to-day decisions I currently make that could be transferred to other members of the management team.

4. Agree clearer responsibilities and decision-making authority with each member of the management team.

5. Begin transferring selected decisions and responsibilities, making it clear when the team can act without referring back to me.

6. Identify any significant gaps in management capability or structure that could prevent the team from taking greater responsibility.

7. Review progress regularly during the 90 days and adjust where necessary as I learn what is working and where further support may be needed.

These Action Steps give James a practical starting point.

He doesn't need to know every step that will follow. He knows what he wants to achieve over the next 90 days and what he can begin doing to move towards it.

MAKE SPACE FOR THE WORK

You've identified your Priority, defined your 90-Day Outcome and considered the Action Steps that could help you move towards it.

But there is one more practical question:
When will you actually work on it?

Preparing yourself and your business for a potential future exit has to compete with the everyday demands of running the business. And even important work can easily be pushed aside by something that feels more urgent.
Earlier in the FOCUS Framework, you looked at where your **Time & Attention** were going and considered what you could **DO, DELEGATE, DELAY or DELETE**.

Now you can put some of that thinking into practice. Look at your Action Steps and ask yourself:

"What do I need to do to make sure I create the time and space to focus on my Priority?"

You don't need to create a detailed schedule for the next 90 days. Instead, think about what would realistically help you protect enough capacity to make progress.

That might mean blocking some regular time in your diary, creating space for particular conversations or simply being more deliberate about what you allow to compete for your attention. **The important thing is that your Priority has somewhere to live in your working week.** Decide what will work for you.

HOW I WILL MAKE SPACE FOR THE WORK:

↓ Go to FOCUS Plan

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JAMES MAKES SPACE FOR THE WORK

James has identified the Action Steps that could help him make meaningful progress towards his 90-Day Outcome.

But he also knows that unless he deliberately creates some capacity, the everyday demands of running the business could quickly take over again. He returns to the decisions he made about his **Time & Attention** in Stage 3. James had already identified several activities he could begin delegating and others that still genuinely require his involvement. He doesn't expect these changes to happen immediately. But they give him somewhere to begin.

James asks himself:
"What do I need to do to make sure I create the time and space to focus on my Priority?"

He writes:

HOW I WILL MAKE SPACE FOR THE WORK:

I will protect three hours every Tuesday morning to work specifically on my Priority and the Action Steps I've identified.

I'll begin transferring some of the day-to-day decisions and responsibilities I identified through my Time & Attention exercise, rather than automatically stepping back into them.

Where possible, I'll avoid booking routine meetings or other work into this protected time.

I'll also use some of this time for the individual conversations I need to have with members of my management team.

If something genuinely urgent requires my attention, I'll reschedule the time rather than simply lose it.

My Priority isn't the only thing that matters. I'll continue to spend time on the responsibilities I've decided still require my involvement and have a short weekly check-in with the owners of the other Business Priorities to understand progress, discuss anything that needs my attention and provide support where needed.

James isn't trying to spend all of his time on his Priority or remove himself from running the business. **He's being more deliberate about where his time and attention go.**

He's protecting meaningful time for the area where he believes his own involvement can make the greatest difference, while continuing to lead the business and maintain visibility of the other Business Priorities.

TAKE YOUR FIRST STEP

You now have a **Priority**, a **90-Day Outcome**, some **Action Steps** and an idea of how you'll **Make Space for the Work**.

There's just one final question:

"What's the first thing I will do to get started?"

Your first step doesn't need to be the biggest or most important action you've identified.

It simply needs to move you from thinking about your Priority to **doing something about it**.

Look at your Action Steps and decide what makes sense to do first.

It might be something you can do today, something you need to put in your diary or a conversation you need to arrange.

Be specific. Rather than:
"Speak to my management team."

You might decide:
"Book a one-to-one meeting with each member of my management team."

The purpose is to move from intention to action. It's to **create momentum**.

Wherever possible, take your First Step **today**. Even a small action begins to turn your thinking into progress.

MY FIRST STEP:

↓ Go to FOCUS Plan

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JAMES TAKES HIS FIRST STEP

James now has everything he needs to begin.

He has identified his **Priority**, defined his **90-Day Outcome**, decided on his **Action Steps** and protected time in his working week to focus on them.

Now he asks himself:

"What's the first thing I will do to get started?"

Looking back at his Action Steps, James knows that one of the first things he needs to do is understand the current responsibilities of his management team and begin talking to them about taking greater ownership.

He could spend more time thinking about how to approach it. Instead, he decides to start.

He writes:

MY FIRST STEP:

Today, I will book a one-to-one meeting with each member of my management team for next week.

I'll explain that I want to review their current responsibilities, understand where they feel confident taking greater ownership and identify where responsibilities or decision-making authority may need to become clearer.

It's a relatively small action.

But it moves James from **thinking about strengthening his management team to actually beginning the work**.

His Priority won't be achieved today.

His 90-Day Outcome won't be achieved today.

And preparing the business so that it can operate successfully without depending on him will take considerably longer.

But he has started.

And that is what COMMIT is about — turning deliberate choices into deliberate action.

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ACCOUNTABILITY MATTERS

You've identified your Priority, decided what meaningful progress looks like and begun turning your thinking into action.

But making a commitment to yourself and maintaining it are two different things.

The day-to-day demands of running a business don't disappear simply because you've decided to prepare for a potential future exit.

And preparing a business for a potential sale isn't simply another project to manage.

You're beginning to change the way the business operates — reducing its dependence on you and, potentially, changing the role you've played within it for many years.

I experienced this myself when preparing my own IT business for its eventual sale.

As responsibilities and relationships began moving away from me, my own role in the business started to change. It was new territory for me, and at times it was challenging.

During that period, I had a business coach.

Having someone outside the business who could challenge my thinking, help me maintain perspective and hold me accountable to the commitments I'd made was personally very valuable.

You may already have someone who can act as an accountability partner.

It could be a business coach, mentor, trusted adviser, fellow business owner or somebody else whose judgement you respect.

The important thing is that your accountability partner understands what you're working towards and can provide challenge, support and accountability as you make progress.

Accountability isn't about somebody else taking responsibility for your progress.

You remain responsible for the decisions you make and the actions you take.

I now provide that same combination of challenge, support and accountability for my own coaching clients as they prepare themselves and their businesses for a potential future exit.

Preparing for a future exit may require you to change your business, your role within it and some of the ways you've worked for many years.

Having the right person alongside you can make that journey easier to navigate.

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5 - PROTECT

Protect the progress you're making

You've decided what matters most, turned your Priority into a 90-Day Outcome and begun taking deliberate action.

But preparing yourself and your business for a potential future exit isn't something you do once.

The changes you're making need time to take hold.

As responsibilities move away from you, your team takes greater ownership and the business becomes less dependent on your involvement, there may be times when it feels easier to slip back into old ways of working.

PROTECT is about helping you maintain the progress you're making, learn from what happens and decide deliberately what deserves your attention next.

In this stage, you'll explore:

- **Protecting your progress** — keeping your Priority visible and regularly checking that meaningful progress is being made, without creating another complicated process to manage
- **Your 90-Day Review** — reviewing your own Priority and the wider Business Priorities, reassessing your Exit Readiness and deciding what, if anything, needs to change
- **Deciding what happens next** — determining whether existing Business Priorities need further attention, whether other areas from your Exit Readiness Assessment should become new Business Priorities or, eventually, whether you feel sufficiently exit-ready to consider what you want to do next

You don't need to make your business perfect.

And you don't need to reach a score of 5 in every area of your Exit Readiness Assessment.

The purpose is to keep making deliberate progress towards a stronger, less owner-dependent business — and towards your Desired Future.

At the end of each 90-day block, **review, reassess and decide what deserves your attention next**.

Then **begin your next 90-day block** with the priorities and outcomes that matter most.

PROTECT YOUR PROGRESS

You've begun taking action towards your Priority.

The challenge now is to **keep making progress while continuing to run the business**.

The day-to-day demands won't disappear. Customers will still need attention, decisions will still need to be made and unexpected issues will still arise.

And as you begin transferring responsibilities to other people, there may be times when it feels quicker or easier to step back in and do things yourself. That's understandable.

But if you continually return to the same responsibilities you're trying to move away from, it becomes harder for other people to take greater ownership — and harder for the business to become less dependent on you.

Protecting your progress doesn't mean rigidly sticking to a plan regardless of what happens.

It means keeping your Priority visible, noticing when progress is beginning to drift and making deliberate choices about what needs your attention.

A simple weekly check-in can help. Take a few minutes to consider:

Am I still making meaningful progress towards my 90-Day Outcome?

Sometimes that one question is enough to remind you what you decided was important — and whether your time and attention are still supporting it.

You may also want to check in with the people who own your other Business Priorities so you maintain visibility of their progress without taking the work back from them.

The aim isn't to follow your plan perfectly. It's to notice, learn and adjust while continuing to move towards your Desired Future.

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YOUR 90-DAY REVIEW

At the end of each 90-day block, take some time to step back and review the progress you've made.

The purpose isn't simply to ask whether you completed everything you planned.

It's to consider what's changed, what you've learned and what deserves your attention next.

MY PRIORITY

Return to the Priority and 90-Day Outcome you defined earlier.

Did I achieve my 90-Day Outcome, and what meaningful progress have I made towards my Priority?

What have I learned — and what, if anything, needs to change or still needs my attention?

THE BUSINESS PRIORITIES

Now consider the other Business Priorities you identified and the people who own them.

What progress has been made on each of our Business Priorities?

What have we learned — and does anything need to change, including the priorities themselves or who owns them?

EXIT READINESS

Return to your original Exit Readiness Assessment and consider the areas you and your team have been working to strengthen.

Based on where the business is today, how would I score those areas now — and what has genuinely changed?

Which areas, if any, now deserve greater attention?

Your scores don't need to reach 5, and your business doesn't need to become perfect.

The purpose is to understand whether you're becoming more exit-ready at a level that feels appropriate for you and your Desired Future.

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As you move through subsequent 90-day blocks, some of your Business Priorities may be completed.

Others may reach a point where they no longer require the same level of attention and can continue as part of the normal operation of the business.

When that happens, return to your **Exit Readiness Assessment**.

Areas you identified earlier may now deserve greater attention and could become new Business Priorities for you or other members of your team.

In this way, your Business Priorities can evolve as the business becomes stronger and less dependent on you.

Eventually, you may reach a point where you feel comfortable with the level of Exit Readiness you've achieved across the areas that matter to you.

When that happens, the question begins to change from:

“What should I strengthen next?”

to:

“What do I want to do next?”

Being exit-ready doesn't mean you have to sell.

You may decide to continue building the business, step back from its day-to-day operation or simply enjoy having greater choice about your future.

Or you may decide that you're ready to begin exploring a potential sale. At that point, it may be appropriate to start speaking with an experienced mergers and acquisitions (M&A) adviser and the other professional advisers who can help you understand the next steps.

Becoming exit-ready gives you greater choice — including the choice to begin an exit process when the time feels right for you.

When you complete your 90-day block, return to the My 90-Day Review pages at the end of your FOCUS Plan to capture what you've learned and decide what deserves your attention next.

JAMES'S 90-DAY REVIEW

James has reached the end of his first 90-day period.

He returns to the same questions and considers what has changed, what he has learned and what deserves attention next.

MY PRIORITY

James's Priority was:

Strengthen the management team so more decisions and responsibilities can be handled without me.

Over the 90 days, James has clarified responsibilities within the management team and transferred several day-to-day decisions that previously came to him.

He can see that fewer routine decisions are now depending on him and members of the management team are beginning to take greater ownership.

But the work has also helped James identify something he hadn't fully appreciated at the beginning of the 90 days.

There is a gap in the management structure.

As he has transferred more responsibility, James has realised that **the business would benefit from an Operations Manager** who could take greater responsibility for its day-to-day operation.

There is still work to do, but James now has a clearer understanding of what may be needed to make the business less dependent on him.

Recruiting an Operations Manager becomes a key action for his next 90-day period.

There will be several practical steps involved — defining the role, agreeing the responsibilities, beginning the recruitment process and ultimately helping the successful person take ownership.

James doesn't need to plan all of those steps now.

What matters is that the work he's done over the last 90 days has helped him identify an important next step that wasn't obvious when he started.

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THE BUSINESS PRIORITIES

James also reviews the **other Business Priorities** being worked on across the business.

Some have progressed well. One has reached a point where it no longer needs the same level of attention and can continue as part of the normal operation of the business.

Another still needs further work and remains with its existing owner.

James recognises that he doesn't need to take ownership of every Business Priority himself.

EXIT READINESS

Finally, James returns to his **original Exit Readiness Assessment**.

He can see genuine progress in the areas relating to owner dependency and people and structure. Responsibilities are clearer, more decisions are being made without him and his management team is taking greater ownership.

His scores may have improved, but James knows that **the scores themselves aren't the objective.**

What matters is that **the business is becoming stronger and less dependent on him**.

Looking across the rest of his Exit Readiness Assessment, James also considers whether any other areas now deserve greater attention.

Some of his existing Business Priorities will continue, while others may eventually be replaced as new priorities emerge.

James then asks himself:

"Given my Desired Future and what I know now, where could my own time, attention and involvement make the greatest difference next?"

He decides what his own Priority should be for the next 90 days and defines a new 90-Day Outcome.

Finally, **James puts his next 90-Day Review in his diary**.

He knows that circumstances may change during the next 90 days, but he has created a clear point when he will step back again, review progress, reassess the business's Exit Readiness and decide deliberately what deserves attention next.

BRINGING IT ALL TOGETHER

You've now worked through the five stages of the Exit Readiness FOCUS Framework:

PAUSE → CLARIFY → PRIORITISE → COMMIT → PROTECT

You've taken an objective look at where your business is today and considered the future you'd ideally like to work towards.

You've assessed your **Exit Readiness**, identified your **Business Priorities** and decided where your own time, attention and involvement could make the greatest difference.

You've turned that Priority into a **90-Day Outcome**, identified practical **Action Steps** and considered how you'll create the capacity to work on them.

And you've created a simple way to step back at the end of each 90-day block, review your progress, reassess your Exit Readiness and decide deliberately what deserves your attention next.

You don't need to address everything at once.

Some areas may improve quickly. Others may take considerably longer.

And as you've seen through James's journey, doing the work may reveal things you hadn't recognised when you started.

That's part of the process.

Over time, your Business Priorities may change. Your own role may change.

And your thinking about your Desired Future may change too.

What matters is that you're making deliberate progress towards a business that is **stronger, less dependent on you and better prepared for whatever you ultimately decide to do**.

Because becoming exit-ready isn't about committing yourself to a sale.

It's about creating greater choice.

And when you reach a point where you feel sufficiently exit-ready, a different question begins to emerge:

"What do I want to do next?"

EXIT READINESS FOCUS FRAMEWORK SUMMARY

The diagram below brings the complete framework together in one place — from stepping back and assessing where you are today, through to taking deliberate action and reviewing your progress over time.

Use it as a simple reminder of how the five stages work together as you continue preparing yourself and your business for a potential future exit.

The framework isn't about completing each stage once and moving on.

As your business becomes stronger, your priorities and your own role may change.

You can return to the framework as you move through subsequent 90-day blocks — reassessing where you are, deciding what deserves your attention next and continuing to move towards your Desired Future.

EXIT READINESS CYCLE

The diagram below shows how the different parts of the Exit Readiness FOCUS Framework connect and how they work together over time.

As you complete each 90-day block, you'll review what you've achieved, reassess your Exit Readiness and decide what deserves your attention next. You can then begin your next 90-day block with updated priorities and a new 90-Day Outcome.

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MY FOCUS PLAN

Now it's time to bring the most important decisions you've made together in one place.

Your **FOCUS Plan** is a concise, practical summary of where you're going, what matters now and what you've committed to doing during your next 90-day block.

You've already done the thinking and made the decisions. Now you're simply bringing the most important ones together in your FOCUS Plan.

Use the navigation links below to return to the relevant sections of the framework.

Copy the text you've already completed, then use the 'Go to FOCUS Plan' link in that section to return here and paste it into your plan.

Repeat this for each section until your FOCUS Plan is complete:

- **Your Desired Future —** return to Stage 2 — CLARIFY: Your Desired Future
- **Your Motivation —** return to Stage 2 — CLARIFY: Your Motivation
- **The Business Priorities & Owners —** return to Stage 3 — PRIORITISE: The Business Priorities
- **Your Priority —** return to Stage 3 — PRIORITISE: Your Priority
- **Your 90-Day Outcome —** return to Stage 4 — COMMIT: Your 90-Day Outcome
- **Your Action Steps —** return to Stage 4 — COMMIT: Your Action Steps
- **Your Time & Attention —** return to Stage 3 — PRIORITISE: Your Time & Attention List
- **How You'll Make Space for the Work —** return to Stage 4 — COMMIT: Make Space for the Work
- **Your First Step —** return to Stage 4 — COMMIT: Your First Step

Your FOCUS Plan keeps the things that matter most visible during your next 90-day block. Keep it somewhere you can refer to regularly.

At the end of the block, complete your 90-Day Review and use what you've learned to update your FOCUS Plan for the next 90-day block.

After completing your FOCUS Plan, you'll see James's completed plan, bringing together the decisions he's made throughout his journey through the framework.

MY DESIRED FUTURE

The future I'm working towards:

↑ Revisit Desired Future

MY MOTIVATION

Why this matters to me:

↑ Revisit Motivation

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↑ Return to Contents

THE BUSINESS PRIORITIES

↑ Revisit Business Priorities

The Business Priorities and who will own them:

Business Priority #: Owner:

MY FOCUS PLAN

MY PRIORITY

↑ Revisit My Priority

Where my time, attention and involvement will make the greatest difference:

MY 90-DAY OUTCOME

↑ Revisit 90-Day Outcome

The meaningful progress I want to make towards my Priority during this 90-day block:

MY ACTION STEPS

↑ Revisit Action Steps

The actions that are required to achieve my 90-Day Outcome:

HOW I WILL MAKE SPACE FOR THE WORK

↑ Revisit Make Space for the Work

How I will create and protect the capacity to work on my Priority:

MY FIRST STEP

↑ Revisit My First Step

The first thing I will do to get started:

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↑ Return to Contents

MY TIME & ATTENTION

↑ Revisit Time & Attention

The responsibilities from my Time & Attention List that I've decided still require my involvement:

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↑ Return to Contents

MY 90-DAY REVIEW

At the end of each 90-day block, take some time to step back and review the progress you've made.

The purpose isn't simply to ask whether you completed everything you planned. It's to consider what's changed, what you've learned and what deserves your attention next.

MY PRIORITY

Did I achieve my 90-Day Outcome, and what meaningful progress have I made towards my Priority?

What have I learned — and what, if anything, needs to change or still needs my attention?

THE BUSINESS PRIORITIES

What progress has been made on each of our Business Priorities?

What have we learned — and does anything need to change, including the priorities themselves or who owns them?

EXIT READINESS

Return to your **Exit Readiness Assessment** and consider the areas you and your team have been working to strengthen.

Based on where the business is today, how would I score those areas now — and what has genuinely changed?

Which areas, if any, now deserve greater attention?

Your scores don't need to reach 5, and your business doesn't need to become perfect.

The purpose is to understand whether you're becoming more exit-ready at a level that feels appropriate for you and your Desired Future.

Use the next page to capture the things that feel most important from your 90-Day Review.

MY 90-DAY REVIEW CONTINUED

MY 90-DAY REVIEW:

JAMES'S FOCUS PLAN

MY DESIRED FUTURE

The future I'm working towards:

Build a stronger business that can operate successfully without depending on me day to day.

Develop a management team that can take greater responsibility and make more decisions without my involvement.

Reduce my involvement in key customer relationships, new business and day-to-day operational decisions, so my role becomes less central to the business.

Put the business in a position where I have the option to sell within the next two years, if the timing and circumstances are right.

If I do sell, be prepared to remain involved for a transition period of up to 12 months, before stepping away completely.

Create the freedom to spend more time with my family, enjoy life outside the business and decide what I want to do next.

MY MOTIVATION

Why this matters to me:

To create greater freedom and choice for myself and my family, knowing I've built a strong business that can succeed without depending on me.

THE BUSINESS PRIORITIES

The Business Priorities and who will own them:

Business Priority #: Owner:

#1. Strengthen the management team so more decisions and responsibilities can be handled without me — Me

#2. Increase recurring managed-service and software revenue and reduce reliance on one-off project work — Sales Director

#3. Improve and document important operational processes and reduce reliance on knowledge held by particular individuals — Operations Lead

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JAMES'S FOCUS PLAN

MY PRIORITY

Where my time, attention and involvement will make the greatest difference:

Strengthen the management team so more decisions and responsibilities can be handled without me.

MY 90-DAY OUTCOME

The meaningful progress I want to make towards My Priority during this 90-day block:

By the end of the next 90 days, I will have clarified the responsibilities and decision-making authority of my existing management team, transferred several day-to-day decisions I currently make to them, and identified any significant gaps in management capability or structure that still need to be addressed.

MY ACTION STEPS

The actions that are required to achieve my 90-Day Outcome:

1. *Review the current responsibilities of each member of the management team and identify where responsibilities or decision-making authority are unclear.*
2. *Meet individually with each member of the management team to understand where they feel confident taking greater ownership and where they may need further support.*
3. *Identify the day-to-day decisions I currently make that could be transferred to other members of the management team.*
4. *Agree clearer responsibilities and decision-making authority with each member of the management team.*
5. *Begin transferring selected decisions and responsibilities, making it clear when the team can act without referring back to me.*
6. *Identify any significant gaps in management capability or structure that could prevent the team from taking greater responsibility.*
7. *Review progress regularly during the 90 days and adjust where necessary as I learn what is working and where further support may be needed.*

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HOW I WILL MAKE SPACE FOR THE WORK

How I will create and protect the capacity to work on my Priority:

I will protect three hours every Tuesday morning to work specifically on my Priority and the Action Steps I've identified.

I'll begin transferring some of the day-to-day decisions and responsibilities I identified through my Time & Attention exercise, rather than automatically stepping back into them.

Where possible, I'll avoid booking routine meetings or other work into this protected time. I'll also use some of this time for the individual conversations I need to have with members of my management team. If something genuinely urgent requires my attention, I'll reschedule the time rather than simply lose it.

My Priority isn't the only thing that matters. I'll continue to spend time on the responsibilities I've decided still require my involvement and have a short weekly check-in with the owners of the other Business Priorities to understand progress, discuss anything that needs my attention and provide support where needed.

MY FIRST STEP

The first thing I will do to get started:

Today, I will book a one-to-one meeting with each member of my management team for next week.

I'll explain that I want to review their current responsibilities, understand where they feel confident taking greater ownership and identify where responsibilities or decision-making authority may need to become clearer.

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MY TIME & ATTENTION

The responsibilities from my Time & Attention List that I've decided still require my involvement:

1. *Supporting selected larger sales opportunities where my involvement can genuinely add value.*
2. *Maintaining involvement in a small number of key customer relationships while gradually transferring more of those relationships to the team.*
3. *Reviewing financial and overall business performance.*
4. *Leading longer-term business strategy and planning.*
5. *Developing and supporting the management team as they take greater ownership and responsibility.*
6. *Working on the changes needed to prepare myself and the business for a potential future exit.*

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WHEN YOU'RE READY FOR THE NEXT STEP

Becoming more exit-ready doesn't mean you have to sell your business.

You may decide to continue building it, step back from some of the day-to-day responsibilities, bring in additional leadership, pursue another opportunity — or simply enjoy having a stronger business that gives you greater choice.

But if you reach a point where you decide **you do want to explore a potential sale**, the nature of the journey begins to change.

Until now, your focus has been on **preparing yourself and your business**.

The next stage may involve beginning conversations with the professional advisers who can help you understand your options and, if appropriate, guide you through a potential transaction.

That could include an experienced **mergers and acquisitions (M&A) adviser**, your accountant, solicitor and other specialists depending on your circumstances.

You don't need to appoint the first adviser you speak to.

Take the time to understand who you may need around you, what role each person would play and whether they have the right experience for your business and circumstances.

You might begin by:

- Identifying and speaking with several potential M&A advisers
- Understanding their experience of selling businesses like yours
- Asking how they approach valuation, preparing a business for market and identifying potential buyers
- Discussing your plans with your accountant and understanding any financial or tax considerations that may require specialist advice
- Speaking with a solicitor experienced in business sales about the legal aspects of a potential transaction
- Considering what information and documentation may eventually be required as part of due diligence
- Understanding what the sale process could involve — including the demands it may place on **your own time and attention**

You don't need to make all of these decisions immediately.

And beginning these conversations doesn't commit you to selling.

It simply helps you become better informed about your options and what the next stage could involve.

The important thing is to recognise when the questions you're asking move beyond exit preparation and into areas where **specialist professional advice is appropriate**.

CONTINUE YOUR JOURNEY

You've now worked through the Exit Readiness FOCUS Framework.

You've stepped back from the day-to-day, considered your Desired Future, assessed your Exit Readiness, decided what matters most and created a practical FOCUS Plan for your next 90-day block. Now it's time to put that thinking into action.

Preparing yourself and your business for a potential future exit may involve changing the way your business operates, reducing its dependence on you and changing your own role within it. You can continue that journey independently, using the framework through successive 90-day blocks.

But if you'd value someone alongside you to provide challenge, support, perspective and accountability, I'd be delighted to help.

My Business Momentum Coaching Programme is how I provide that support:

BUSINESS MOMENTUM COACHING PROGRAMME

This one-to-one coaching programme gives you dedicated time and space to step away from the day-to-day running of your business, think clearly about your business and continue working on the areas that matter most as you prepare yourself and your business for a potential future exit.

My role isn't to tell you what to do. It's to help you think more clearly, challenge your assumptions when needed, make your own informed decisions and turn those decisions into meaningful action.

If you'd like to explore whether working together could help you continue the progress you've started here, the next step is simply to have a conversation.

Your complimentary Discovery Call gives us an opportunity to talk about your business, what you're working towards and whether coaching could help. There's no obligation and no sales pressure. Just an honest conversation about you, your business and what you want for the future:

SCHEDULE YOUR COMPLIMENTARY DISCOVERY CALL

Whatever you decide to do next, I hope the Exit Readiness FOCUS Framework helps you build a stronger, less owner-dependent business and gives you greater choice about what the future looks like.

Kevin Thomas

Founder & Coach
New Perspectives Business Coaching