Assessment Interpretation & Follow-Up Guide

Using the Exit Readiness Assessment to prepare thoughtful, appropriately paced owner conversations

Purpose and scope

InfusionOS currently provides one universal business owner assessment: the Exit Readiness Assessment. Use its responses to understand what an owner is thinking about, identify useful conversation topics, and plan proportionate follow-up. Do not interpret a score as a diagnosis, valuation, or definitive conclusion about transaction or personal readiness.

1. Review the context before responding

- Confirm which business owner completed the assessment and review the contact record for prior interactions, expressed preferences, and scheduled appointments.
- Read the owner's individual responses and any available summary. Do not focus on a single overall score in isolation.
- Identify two or three topics that merit clarification. Separate what the owner actually reported from your interpretations or assumptions.
- Check whether a discovery call has already been booked. If so, prepare for the conversation rather than sending duplicative invitations.

2. Turn responses into questions, not conclusions

Potential theme	Constructive follow-up question
Leadership continuity	How are key decisions and responsibilities handled when you are away?
Owner dependence	Which parts of the business still rely most heavily on your direct involvement?
Future timing	What led you to select that time horizon, and what might change it?
Personal objectives	What would a successful next chapter ideally look like for you?
Uncertainty or gaps	Which assessment question was hardest to answer, and why?

3. Prepare for the discovery conversation

Start with curiosity: ask which answers surprised the owner or prompted further thought. Discuss their priorities before recommending a process or service. Use Andrew's existing Personal Readiness Methodology when a substantive personal-readiness discussion is appropriate; this guide does not replace that methodology.

4. Select a proportionate next step

Owner response	Appropriate advisor action
Wants to explore further	Offer or prepare for a discovery call; clarify expectations and suitable next steps.
Interested but not ready	Document stated timing and agreed next contact; consider authorized educational follow-up.
Requests a specific resource	Share only the relevant asset after obtaining the firm's required compliance approval.
Declines further contact	Respect the preference and do not initiate automated nurture without authorization.

5. Document and manage follow-through

- Capture concise, factual notes in the contact profile, including the owner's own words where useful. Avoid speculative diagnoses and unnecessary sensitive details.
- Create a dated task for any personal commitment. If a discovery call occurred, update the opportunity stage manually based on its outcome.
- Assessment completion may create or update an opportunity, but does not by itself mean an owner is ready to engage.
- For automated nurture, verify the required authorization and manually set Nurture Permission to Yes when appropriate. New or imported contacts never default to Yes.
- For any individual email, confirm appropriate authorization. Use only firm-approved prospect-facing assets and language.

Key boundaries

Assessment results are educational and contextual. Do not represent them as an established business valuation, a prediction of saleability, or proof that a transition is appropriate. The advisor remains responsible for professional judgment, confidentiality, communication permission, and firm compliance review.

Suggested advisor review questions

- What is the owner's most important stated concern or objective?
- What needs clarification in a direct conversation?
- What has the owner explicitly agreed to receive or do next?
- Which follow-up action belongs in InfusionOS, and who is responsible?