Advisor Assessment Follow-Up Worksheet

Internal planning worksheet | Exit Readiness Assessment

Use this worksheet after reviewing an owner's assessment responses. Record facts and agreed actions, not presumed diagnoses. This is an internal advisor tool, not a client-facing assessment.

A. Assessment and owner context

Field	Advisor entry
Business owner / company	
Assessment completed (date)	
Advisor / review date	
Discovery call (if booked)	
Prior relationship / relevant context	

B. Key observations from actual responses

What the owner reported	Question or topic to explore

C. Conversation preparation

- Which assessment answer seemed most important to the owner?
- Which priorities or uncertainties should be explored without assumptions?
- What would be useful to clarify about timing, goals, or next steps?

D. Conversation notes

Owner's comments / expressed priorities	Agreed interpretation or open question

E. Appropriate next step

- ☐ Offer or prepare for a discovery call
- ☐ Send a specific, firm-approved educational resource
- ☐ Agree on a personal follow-up date
- ☐ Discuss a relevant method or next-step engagement
- ☐ No further contact requested

Action owner	Action / next step	Due date

F. InfusionOS follow-through checklist

- ☐ Record factual notes in the contact profile.
- ☐ Create a follow-up task with a due date where applicable.
- ☐ Review any resulting opportunity; manually change post-call stage when needed.
- ☐ Confirm authorization before emailing; automated nurture requires Nurture Permission set to Yes after verification.
- ☐ Confirm the firm's compliance approval before sharing a digital asset or external-facing message.

Reminder: The Exit Readiness Assessment is a discussion aid, not a valuation or definitive readiness determination. Do not assume consent from assessment completion alone.