Business Owner Conversation Planning Worksheet

Internal advisor worksheet | Use before and after an introductory owner conversation

Use this internal worksheet to plan thoughtful questions, capture agreed next steps, and maintain appropriate follow-up. It is not a client-facing assessment and does not replace Andrew's Personal Readiness Methodology.

A. Conversation preparation

Business owner / contact	_____
Company	_____
Date / channel	_____
Introduction or relationship context	_____
Why this conversation matters	_____

B. Areas to explore

Choose a few questions rather than reading a checklist to the owner.

- What is the owner focused on accomplishing in the business today?
- Which parts of ownership are most rewarding or most demanding?
- How might the owner's role evolve in the coming years?
- What goals, uncertainties, or questions has the owner volunteered?
- Who else should be involved if a future conversation becomes appropriate?

C. Conversation observations

Owner's stated priorities	_____ _____
Questions or concerns raised	_____ _____
Relevant timing or readiness signals	_____ _____
What we should not assume	_____

D. Agreed next steps

Next step	Details / date
☐ Send an approved educational resource	_____
☐ Offer approved assessment	_____
☐ Arrange discovery call	_____
☐ Make referral / introduction	_____
☐ Schedule personal follow-up	_____
☐ No follow-up requested	_____

E. InfusionOS follow-through

- ☐ Record factual notes in the contact profile.
- ☐ Create a task for any agreed follow-up with a due date.
- ☐ Confirm any individual email is appropriately authorized.
- ☐ For automated nurture, verify permission and manually set Nurture Permission to Yes only with authorization.
- ☐ Use only firm-approved client-facing digital assets and communications.
- ☐ Review any opportunity activity and update its status when advisor action is required.

Reminder: This worksheet is for advisor use only. Do not treat a conversation, introduction, or contact creation as permission for automated communications.