Business Owner Engagement Guide

A relationship-first approach to productive conversations and appropriate follow-up

Purpose

Business owners are often focused on today's operational demands rather than actively seeking advisory services. An initial conversation should therefore be about understanding the owner, earning trust, and determining whether a useful next step exists. It is not a sales presentation or a substitute for the Personal Readiness Methodology.

1. Prepare before you reach out

- Understand what the business does, the owner's role, and any known context for the introduction.
- Know why you are reaching out. A shared professional connection or a relevant business question is more useful than a generic pitch.
- Choose a small number of open-ended questions. Leave room for the owner to lead the discussion.
- Prepare an appropriate, compliance-approved educational resource only if it would help the conversation.

2. Lead with curiosity, not a solution

Use open-ended questions that help the owner describe their experience without assuming they want to sell, retire, or engage an advisor.

Conversation focus	Possible opening question
Background and motivation	What led you to start or acquire the business?
Current priorities	What is taking most of your attention as an owner right now?
Enjoyment and friction	Which parts of ownership do you enjoy most? Which are getting harder?
Looking forward	How do you imagine your role in the business changing over the next few years?
Decision context	Who else would normally be involved in a decision about the business's future?

3. Listen for useful signals

An owner may mention leadership succession, a changing personal role, uncertainty about business value, dependency on the owner, family considerations, or no defined longer-term plan. These are possible conversation themes, not a diagnosis of readiness. Ask permission before exploring sensitive issues.

4. Choose the next step that fits the owner

What you hear	Appropriate advisor response
Exploring, not ready	Offer an approved educational resource and ask whether future follow-up would be welcome.
A specific unanswered question	Suggest an approved assessment or relevant information if appropriate.
Interested in a substantive discussion	Offer a discovery call to understand fit and potential next steps.
Not interested	Respect the response; do not add the owner to automated nurture without authorization.

5. Follow up in a way that builds trust

- Record factual context and agreed next steps in the contact record. Avoid speculative or unnecessarily sensitive notes.
- Make a task for any personal commitment, such as sending approved information or arranging an introduction.
- Only send communications for which the owner has provided appropriate authorization. Automated nurture requires verified authorization and Nurture Permission set to Yes.
- When a resource download, assessment, or booking occurs, review the resulting opportunity and follow up according to the owner's expressed interest.
- If timing is not right, respect it. Consistent relationship development is more valuable than pressure.

Practice reminder

InfusionOS provides resources, assessments, appropriate automated follow-up, and opportunity tracking. The advisor remains responsible for listening, applying professional judgment, obtaining communications permission, and following firm compliance procedures. Any client-facing resource must be approved by the advisor's firm before use.