Intro to Stakeholders Tool – Worksheet

A stakeholder is a _____ with a

_____

_____

Four types of stakeholders:

1. _____
2. _____
3. _____
4. _____

These groups are often considered **"primary stakeholders**," as their interests are directly tied to the success of a business or project.

Personal notes:

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Stakeholder Material for Individuals – Worksheet

The objective of this tool: _____

_____

The question you must ask is _____

None of us live in a vacuum. There are consequences we may not see at first glance.
Think holistically.

When moving into a new season of life, an unfortunate reality for many people is

_____

_____

_____

_____

The good news:
all of us have the ability to make amends with people we love and care about.

Personal notes:

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Family Dynamics and Related Stories – Worksheet

One way to assure things go wrong in your transition: _____

_____. This step is desisgned to _____

_____

Your family and friends are definitely thinking about this transition.
So, have these conversations with them.

Lack of alignment and clarity results when _____

_____

_____

Communicaiton is key.

Personal notes:

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Teaching the Stakeholders Tool – Worksheet

Before you begin writing in the stakeholders' tool pages _____

_____

Why this step is so critical: _____

_____

_____

Don't be caught off guard when you realize hours or days later that you forgot about a certain person.

Personal notes:

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SecondWave Date: _____

Intro to Stakeholders Tool – Worksheet

A stakeholder is a _____ with a

_____

_____

Four types of stakeholders:

1. _____
2. _____
3. _____
4. _____

These groups are often considered **"primary stakeholders**," as their interests are directly tied to the success of a business or project.

These 2 unique groups each have a different **critical conversation.**

Two groups of stakeholders:

1. _____
2. _____

In talking to the "home team:" _____

_____

_____

_____.

In talking to the "work team:" _____

_____

_____

_____.

When you have overlap: _____

_____

_____

_____.

Personal notes:

Teaching Family Dynamics – Worksheet

The objective when walking a client through the stakeholder framework:

_____

_____

An unfortunate reality for many entrepreneurs is that in running the business over the years, there may be **a wake of damaged relationships** in their rearview mirror.

It's critical that you _____

_____

_____

The good news is all of us had the ability to make amends with people – it's never too late to say "I'm sorry" and start over with people that are closest to us.

When working with the client and talking through family dynamics, we want to understand

_____

_____

Personal notes:

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Teaching Team Dynamics – Worksheet

When teaching team dynamics, you must consider _____

_____

_____

This **uncertainty** is particularly unsettling for teams that have been on a good run and or really enjoy working together via a strong culture.

The challenge here is _____

_____

_____.

Prepare your client for the truth that _____

_____

_____

_____.

Personal notes:

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Teaching the Stakeholders Tool – Worksheet

In teaching the stakeholder tool, your role here as guide will likely be to keep asking three core questions:

Three core questions:

1. _____

2. _____

3. _____

Before your client begins writing in the stakeholders' tool pages, require that they take some time to think through the questions in the book.

Guide them in thinking about _____

_____

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Personal notes:

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SecondWave Date: _____

Introduction to Second Wave Life – Worksheet

People going through critical life transitions are often faced with the loss of _____

_____

The **second wave process** allows you to realize that you haven't lost your identity.

There is a new _____ to be identified and _____ and _____

_____

Three legs of the stool:

1. _____
2. _____
3. _____

Personal notes:

_____

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_____

_____

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Traditional M&A Process – Worksheet

Two processes:

1. _____
2. _____

It was in diagramming how these two processes work together, a colleague-friend said to me “oh, it looks like **two different waves** – the first wave and the second wave.”

Personal notes:

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What is a “second wave life”? – Worksheet

I define a “second wave life” as: _____

_____

_____

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_____

People going through critical life transitions are **faced with the fundamental loss** of what they believe their purpose in life is.

Personal notes:

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SecondWave Date: _____

Introduction to Second Wave Life – Worksheet

People going through critical life transitions are often faced with the loss of _____

_____

The **second wave process** allows your client to realize that you haven't lost your identity.

There is a new _____ to be identified and _____ and _____

_____

Three legs of the stool:

1. _____
2. _____
3. _____

Personal notes:

_____

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Traditional M&A Process – Worksheet

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1. _____
2. _____

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Personal notes:

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What is a “second wave life”? – Worksheet

I define a “second wave life” as: _____

_____

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People going through critical life transitions are **faced with the fundamental loss** of what they believe their purpose in life is.

Helping clients successfully exit a business positions them to _____

_____

Personal notes:

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How to Approach the Second Wave Life – Worksheet

This process is _____. The Second Wave process is based on the work of _____

Viktor Frankl noted that a **human's deepest desire** is to find meaning in life, and if they can find meaning, they can survive anything.

Three ways to find meaning in life:

1. _____
2. _____
3. _____

This program is about helping you see the second wave of your life as a new *beginning* that will allow you to embrace a **new and perhaps deeper purpose.**

The quality of your outcome in this course is directly related to _____

_____

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Personal notes:

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Introduction to "Untangling the Work Wires" – Worksheet

According to Logotherapy theory, one of the three ways human beings find purpose is through _____. Learning how to _____ your business-owner skills and qualities is critical.

High achievers, across all walks of life, are **driven differently** than others.
But your drive for excellence, growth, and development isn't a switch that you're just going to "turn off" on your final day with your company.

_____ and what your _____ reaches far beyond the business that you own today. The important thing is not what you do, it's _____

_____

If you see your work as your core identity, you are at risk for a strange sense of boredom, unfulfillment or unhappiness *after exiting*.

Personal notes:

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Untangling the Work Wires – Worksheet

Entrepreneurs often have a difficult time _____

which keep their mind and identity chained to the job.

A life best lived **requires a purpose.**

Knowing your _____ in the second wave of your life may literally be a matter

_____

Personal notes:

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Accepting Help in Untangling the Work Wires – Worksheet

In 2011, the Exit Planning Institute published a study showing that **75% of entrepreneurs** regretted their decision to sell their company.

Three main reasons entrepreneurs regretted selling their business:

1. _____

2. _____

3. _____

How and why do entrepreneurs end up regretting the sell?

_____

_____

_____

When you exit your business, the good news is that there is **so much more life ahead of you.**

Personal notes:

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SecondWave Date: _____

Teaching the Second Wave Life – Worksheet

There are two elements to use as an introduction for your clients:

1. _____

2. _____

It's critical to help your client's understand that **the quality of their outcome** is directly proportionate to how much time they invest in doing this work.

The Second Wave life process is based on the work of _____.

Viktor Frankl outlined his philosophy that man's deepest desire is to _____

_____

The Second Wave process is about helping your clients see the next season of life as a **new beginning** that will allows them to embrace a new and perhaps deeper purpose.

Personal notes:

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Introduction to "Untangling the Work Wires" – Worksheet

According to Logotherapy theory, one of the three ways human beings find purpose is through _____. For your client, learning how to _____their business-owner skills and qualities is critical.

High achievers, across all walks of life, are **driven differently** than others. But their drive for excellence, growth, and development isn't a switch that they can just "turn off" on their final day with their company.

_____ and what their _____ reaches far beyond the business that they own today. The important thing is not what they do, it's _____

_____

If your client see your work as their core identity, they are at risk for a strange sense of boredom, unfulfillment or unhappiness *after exiting*.

Personal notes:

_____

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Untangling the Work Wires – Worksheet

Entrepreneurs often have a difficult time _____

which keep their mind and identity chained to the job.

A life best lived **requires a purpose.**

For your client, knowing their _____ in the second wave of life may literally be a matter of _____

Personal notes:

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Accepting Help in Untangling the Work Wires – Worksheet

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Three main reasons entrepreneurs regretted selling their business:

1. _____

2. _____

3. _____

How and why do entrepreneurs end up regretting the sell?

_____

_____

_____

When your client exits their business, the good news is that there is **so much more life ahead.**

The challenge at this point is to help them shift their _____.

Personal notes:

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Introduction to the Tribe Tool – Worksheet

Your maximum impact and fulfillment come when _____

_____

The **second wave process** allows your to realize that you haven't lost your identity.

The objective of this tool:

_____

_____

_____

Three categories of core values in business:

1. _____
2. _____
3. _____

Personal notes:

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Teaching the Core Values Tool – Worksheet

Personal notes:

Introduction to the Tribes Tool – Worksheet

Tribe is synonymous with _____. A tribe is a community or cause that is important to you – and that you need to fulfill your life.

Think through what parts of your community you are going to choose to focus on in this next season.

Personal notes:

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The Tribes Tool – Worksheet

Tribe Categories:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Take your time and give this broad consideration – you're transitioning into a new season of your life, where you are going to have the time freedom you have always hoped for.

Personal notes:

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Teaching the Tribes Tool – Worksheet

Personal notes:

The Time Tool – Worksheet

The term "significat time" highlights the reality that _____

_____

The intention of this tool is to help you realize and prioritize the use of your "significant time" for this second wave of your life.

Personal notes:

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Teaching the Core Values Tool – Worksheet

Personal notes:

Introduction to the Tribes Tool – Worksheet

Tribe is synonymous with _____. A tribe is a community or cause that is important to your client – and that they need to fulfill their life.

Help your client think through what parts of their community they are going to choose to focus on in this next season.

Personal notes:

_____

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SecondWave Date: _____

The Tribes Tool – Worksheet

Tribe Categories:

1. _____
2. _____
3. _____
4. _____
5. _____

Strongly encourage your cleints to take their time and give this broad consideration.

The challenge here is to _____

_____

Personal notes:

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Teaching the Tribes Tool – Worksheet

Personal notes:

The Time Tool – Worksheet

The term "significat time" highlights the reality that _____

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The intention of this tool is to help your client realize and prioritize the use of their "significant time" for this second wave of your life.

Personal notes:

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SecondWave Date: _____

Teaching the Time Tool – Worksheet

Personal notes:

Introduction to the Travel Tool – Worksheet

Time spent traveling shortly after executing an exit can be leveraged to _____

_____

Think about is how Travel might **synergize** with your Tribes and Talents to help make a huge impact on the world in your next season

Three-step process of the Travel Tool:

1. _____
2. _____
3. _____

Personal notes:

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How to complete the Travel Tool – Worksheet

Three categories for destinations:

1. _____

2. _____

3. _____

To integrate your selected locations into a master prioritized list consider: _____

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_____

Take your time to enjoy the process!

Personal notes:

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Introduction to the Talent Tool – Worksheet

The Second Wave process is about **intentionally aligning** your talents with your values and tribes

Personal notes:

Activism Talent – Worksheet

The Activism Talent can include:

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Personal notes:

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Competition Talent – Worksheet

The Competition Talent can include:

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Personal notes:

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Financial Talent – Worksheet

The Financial Talent can include:

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Personal notes:

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Legacy Talent – Worksheet

The Legacy Talent can include:

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Personal notes:

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Philanthropy Talent – Worksheet

The Philanthropy Talent can include:

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Personal notes:

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The Portfolio Talent – Worksheet

The Portfolio Talent can include:

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Personal notes:

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“Others” – Worksheet

“Others” can include:

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Personal notes:

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The Talent-Tribe Match – Worksheet

Personal notes:

Introduction to the Travel Tool – Worksheet

Time spent traveling shortly after executing an exit can be leveraged to _____

_____

Help your client think about is how Travel might **synergize** with their Tribes and Talents to help make a huge impact on the world in their next season

Three-step process of the Travel Tool:

1. _____
2. _____
3. _____

Personal notes:

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How to complete the Travel Tool – Worksheet

Three categories for destinations:

1. _____

2. _____

3. _____

To help your client create master prioritized list consider: _____

_____

_____

_____

Take your time to enjoy the process!

Personal notes:

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SecondWave Date: _____

Introduction to the Talent Tool – Worksheet

The Second Wave process is about helping your client **intentionally align** their talents with their values and tribes

Personal notes: