THE SECOND WAVE LIFE

Chapter 9 Overview: The Tribe Tool

Advisor Reference Overview | Based on The Second Wave Life: Finding Purpose, Impact and Fulfillment, Post-Exit by Andrew Williams

Chapter focus: Tribes are the people, groups, and communities that matter most to the owner. Chapter 9 helps owners identify the communities they value today, recognize where business relationships may disappear after exit, and intentionally build the relationships and communities they want in the next stage of life.

Chapter at a Glance

Chapter 9 defines Tribes as the individuals, groups, and communities that mean the most to the owner and offer opportunities for connection, belonging, and impact. Williams emphasizes that many business owners receive a large share of their community through the company, making the loss of work-based relationships an important personal-readiness issue.

The Tribe Tool asks the owner to identify current communities, explain why each matters, describe the ideal future relationship with each Tribe, and determine the actions needed to move toward that ideal. It also asks the owner to consider where new communities may need to be added after exit.

Core Themes

1. Tribes are the owner's communities

The chapter defines Tribes broadly to include the people, groups, organizations, and communities that matter most. These can include family, friends, faith communities, clubs, professional relationships, and other groups that create belonging and opportunity for impact.

2. The business may currently provide much of the owner's community

Williams warns that after an owner exits, the company may no longer serve as a primary source of social connection. That change can be difficult even for owners who have strong relationships outside the business.

3. Community deserves intentional planning

The purpose of the Tribe exercise is not simply to inventory current relationships. It asks the owner to decide which communities deserve greater focus in the next season and where new relationships or communities may need to be developed.

Core Themes, Continued

4. Values help identify the right Tribes

The chapter asks owners to connect the Tribe exercise back to the Values Guide. The owner should consider which communities make core values easier to live, reinforce those values, or hold the owner accountable to them.

5. Belonging matters

Williams asks owners to reflect on where they feel a genuine sense of belonging and which groups share common goals, beliefs, interests, or ideas. The focus is not on joining groups for activity alone, but on finding communities that feel meaningful.

6. The ideal relationship should be defined

For each Tribe, the owner is asked to consider what an ideal relationship would look like. This turns the exercise from a passive list into a vision for how the owner wants to participate, contribute, and stay connected.

7. Action should follow reflection

The Tribe Plan asks owners to identify specific actions needed to reach the desired relationship with each community. The accompanying guide recommends placing those actions on the calendar or personal task list while the purpose and momentum are clear.

8. New Tribes may be necessary

If an owner struggles to identify enough meaningful communities, the chapter encourages turning the question around and asking what types of communities should be added to support a thriving life after exit.

> Central idea for advisors: Leaving a business can also mean leaving an important social ecosystem. The Tribe Tool helps owners make that invisible loss visible and intentionally build the relationships, communities, and sense of belonging they want to carry into the Second Wave Life.

What the Advisor Should Listen For

- Most of the owner's close relationships are connected to the business.
- The owner has not considered how daily social interaction may change after exit.
- The owner can name activities but struggles to identify communities where they feel genuine belonging.
- The owner identifies Tribes that do not appear aligned with their stated core values.
- The owner wants stronger relationships with certain groups but has no plan for increasing involvement.
- The owner has significant gaps in community that may become more noticeable when work relationships decrease.

Advisor Conversation Prompts

- Which people and communities currently give you the strongest sense of belonging?
- How much of your current community comes directly from the business?
- Which relationships are likely to change when you are no longer involved in the company every day?
- Where do you find people who share your values, interests, or beliefs?
- Which Tribes give you energy, and which ones give you opportunities to contribute or make an impact?
- What new communities might you want to add to your life after the business?

How Chapter 9 Connects to Personal Readiness

Within the InfusionOS Personal Readiness Methodology, Chapter 9 addresses the relationship and belonging side of life after ownership. The owner is encouraged to consider not only who is currently important, but also

which communities should receive more attention, which relationships may change, and what actions can strengthen or create the Tribes needed for the next stage of life.

Chapter 9 Concept	Personal Readiness Connection
Tribes are communities that matter	The owner can identify the people and groups that provide belonging, connection, support, and opportunity for impact.
Work may currently supply much of the owner's social capital	The advisor can help surface relationship gaps that may emerge when the business is no longer the center of daily life.
Values should connect to Tribes	The strongest communities may be those that reinforce the owner's core values and make those values easier to live.
Ideal relationships require action	The Tribe Plan moves from identification to a desired future state and then to specific actions.
New Tribes may need to be created	Personal readiness includes intentionally adding new communities when current relationships will not fully support the next chapter.

Advisor Takeaway

Chapter 9 gives advisors a practical way to help owners think about life after the business in relational terms. The advisor can use the Tribe Tool to help the owner identify current sources of belonging, anticipate which communities may change after exit, and convert desired relationships into specific actions that can begin before the transition is complete.

Suggested Use in the Advisor Portal

Use this overview as a quick reference before or after reading Chapter 9. It can support the Tribe Tool lesson and help advisors prepare owners to complete the Tribe Plan. It is not a substitute for reading the complete chapter or completing the related Personal Readiness training and worksheet.

Source: Andrew Williams, The Second Wave Life: Finding Purpose, Impact and Fulfillment, Post-Exit, Chapter 9: "The Tribe Tool."

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