

WHAT'S NEXT? COACHING PROGRAM

Clarity, knowledge of the unknowns and peace of mind for baby boomer business owners



The coaching program helps you successfully address the personal and emotional side of transitioning out of your business, and help you avoid experiencing Owner's Indecision and Seller's Remorse. The fact is that leaving your company may be the most significant transition of your adult life. For many owners, leaving a business has almost the same impact as leaving a family. The questionnaires and exercises in the coaching program provide a step-by-step methodology which helps you think strategically about not only what needs to be done to maximum the value of your company, it also helps you become emotionally ready to let go of your business, find peace-of-mind, build a new personal identity, and begin planning what to do with the next chapter of your life.

The questionnaires, exercises and to-do-checklists and coaching will help you:

- Clear any vagueness that you might have
- Avoid pitfalls that can cost you a lot of money
- Objectively know how motivated you really are
- Avoid emotionally sabotaging the succession process
- Become aware of potential emotions that can hurt you
- Hold advisors accountable to meet your outcome goals

Content of What's Next? Coaching Program

- **“WHAT’S NEXT FOR YOUR FUTURE? guide”** How to avoid retirement remorse and “push start” on a successful business and personal transition”
- **What’s Next? Questionnaire & Report** presents in a clear and organized way
 - Focuses you on your personal and business goals and objectives
 - Creates greater objectivity to your decision making
 - Enables you to express what you feel in a safe format
 - Your motivations for wanting to leave
 - Your transition goals
 - Your attitude and expectations
 - How emotionally prepared you are for leaving
 - If you have a plan for a meaningful and purposeful new life after you leave your company
- **Decision-Making Questionnaire and Report** – There are five distinct decision-making patterns that professionals use when making high-stakes decisions such as: “How am I going to do with my business?” or “What am I going to do with my life?” It is important for you to know your primary decision-making process, since it determines how you choose the goals you wish to achieve, obtain information about the issues you have to decide on, assess or analyze data about your future, and to make and implement your final decisions. The report informs you of your special strengths, how you can use your strengths in making future decisions, and what to avoid.
- ***Finding Your New Owner: For Your Business, For Your Life***, voted Top 10 in Management Books by the 2012 Small Business Book Awards. The book presents:
 - Stories of successful and unsuccessful transitions
 - Step-by-Step advice to get moving
 - Exercises to motivate owners to change
 - 200 pages, larger type size for middle-age eyes

- **What's Next Coaching Sessions:**
 - **Allows *objective assessments*** of your personal and business goals and objectives, by incorporating basic planning principles
 - **Focuses you on subjective financial hurdles** that can sabotage you from making a successful transition
 - **Accelerates your making** a successful business and personal transition by helping you do an accurate appraisal of yourself
 - **Avoids your feeling uncomfortable** by sharing your inner-most thoughts in a room full of strangers
 - **Provides a non-threatening framework** for you to talk about key issues that you have not previously raised with your spouse or key employees.
 - **Creates a "neutral third party"** that depersonalizes emotional, financial and business issues
 - **Expands your awareness** so you can learn more answers and be able to ask new questions to your advisors
 - **Enables you to think strategically** about your emotions and the future of your business

For more information, please contact:

Beth Davis, Beth@PlanningWhatsNext.com, 617-504-8499