

# The Owner's Compass



## Designing Your Future on Purpose

This questionnaire is designed to help you understand **how your personal goals, financial reality, business readiness, and market conditions interact** to shape the *strategic options* available to you as an owner. Rather than forcing a binary “grow vs. sell” decision, the tool places you along a **continuum of viable options**, revealing:

- Which paths are most aligned
- Which paths are not currently realistic
- What must change to unlock additional options

The goal is not to choose a final answer, but to identify the **most coherent next move**. There are no “right” or “wrong” scores.

After completing the diagnostic, owners typically gain clarity on:

- **Where you feel pulled** (intent and desire)
- **What constraints exist today** (financial, leadership, transferability)
- **Why certain paths feel stressful or stalled**
- **Which options are viable now vs. later**
- **What trade-offs they are implicitly making**

This diagnostic doesn't tell you what you *should* do. It shows what's true and what choices that truth allows.

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## How to Use It

Rate each statement on a **1–7 scale**

- **1–2** = Not true / Strongly disagree
  - **3–4** = Somewhat true / Inconsistent
  - **5–6** = Mostly true
  - **7** = Very true / Strongly agree
- Answer based on what is **true today**, not what you hope will be true.
  - Answer quickly and honestly. Precision matters less than **Scoring Patterns**.
  - Total each section and note where your scores are **consistently high, low, or mixed**.

## **Section A: Owner Intent & Time Horizon**

*(How you want your relationship to the business to change)*

- 1.I want my role in the business to change significantly in the next 1–3 years.
- 2.I am more motivated by future options than by a final “exit.”
- 3.Preserving continuity or legacy of the business matters deeply to me.
- 4.I enjoy building systems others can run.
- 5.I am emotionally ready to let others make major decisions.

**Section A Score: \_\_\_\_ / 35**

## **Section B: Personal Financial Readiness & Risk**

*(How much pressure the business carries for you personally)*

- 1.I am financially secure without needing a near-term sale.
- 2.Most of my net worth is not tied up in the business.
- 3.I am comfortable taking calculated risk over the next 3–5 years.
- 4.I prioritize flexibility and upside over certainty and finality.
- 5.I could accept a “good enough” outcome if it aligned with my life goals.

**Section B Score: \_\_\_\_ / 35**

## **Section C: Business Transferability & Independence**

*(How sellable or scalable the business is without you)*

- 1.The business performs well without my daily involvement.
- 2.Revenue is driven by systems more than personal relationships.
- 3.Our value proposition is clear, differentiated, and defensible.
- 4.Losing one major client or employee would not seriously threaten the business.
- 5.Our financials and operations would hold up under external scrutiny.

**Section C Score: \_\_\_\_ / 35**

## **Section D: Leadership & Successor Readiness**

*(Whether the business can thrive under different leadership)*

1. There is at least one person who could lead this business long term.
2. Decision-making authority is already distributed beyond me.
3. Leadership development is intentional and ongoing.
4. I trust the team to uphold the culture without my constant presence.
5. The organization would support an internal successor.

**Section D Score: \_\_\_\_ / 35**

## **Section E: Market & Strategic Attractiveness**

*(Timing, leverage, and external interest)*

1. Our market is growing or consolidating in our favor.
2. Buyers, investors or partners are active in our space.
3. We occupy a clearly defined strategic position.
4. Our value goes beyond short-term financial performance.
5. Waiting 3–5 years could meaningfully improve business value.

**Section E Score: \_\_\_\_ / 35**

## **Section F: Desired Future Configuration**

*(Naming non-obvious but valid paths)*

1. I would like partial liquidity without fully exiting the business.
2. I would consider merging with or joining forces with a peer.
3. I want to intentionally optimize quality of life over scale.
4. I want the business to outlive me in a specific, values-aligned way.
5. I want to focus on building options before committing to an outcome.

**Section F Score: \_\_\_\_ / 35**

# Scoring & Interpretation

## Step 1: Section Averages

Calculate the average score for each section (A–F).

## Step 2: Identify Three Signals

- Primary Pull – Highest section(s): where the owner is naturally heading
- Constraints – Lowest section(s): what limits certain paths
- Tension Zones – High intent with low readiness
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## Step 3: Continuum Placement

Rather than choosing a single option, identify 2–3 adjacent futures that best fit your scores.

**Schedule a meeting** to explore how to use your score to make strategic business decisions.

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## OPTION 1: GROW + TRANSITION OUT OF DAY-TO-DAY

**Scoring Pattern:** High A, B; moderate C, D

### Going Deeper:

- “What would need to be true for you to step back with confidence?”
- “Where are you ‘the system’ instead of owning the system/process?”

## OPTION 2: GROW WITH INTERNAL SUCCESSION (3–5 YEARS)

**Scoring Pattern:** High A, D, E

### Going Deeper:

- “Who are you truly willing to hand this to?”
- “What leadership gaps would derail this plan if left unaddressed?”

## OPTION 3: PREPARE FOR NEAR-TERM SALE

**Scoring Pattern:** High C, E; lower A, D

### Going Deeper:

- “What would make this business easier to buy?”
- “Where is your emotional readiness lagging behind financial readiness?”

## **OPTION 4: PARTIAL LIQUIDITY / DE-RISKING**

**Scoring Pattern:** High B concern, high 26

### **Going Deeper:**

- “How much risk do you still want to carry personally?”
- “What would financial breathing room make possible for you?”

## **OPTION 5: LIFESTYLE OPTIMIZATION**

**Scoring Pattern:** High 28, moderate A, low E

### **Going Deeper:**

- “What complexity no longer serves you?”
- “If growth stopped, what would improve?”

## **OPTION 6: STRATEGIC MERGER**

**Scoring Pattern:** High 27, E; moderate D

### **Going Deeper:**

- “Where are you limited going it alone?”
- “What would shared leadership make possible?”

## **OPTION 7: HARVEST & WIND DOWN**

**Scoring Pattern:** Low A, C, D; moderate cash flow

### **Going Deeper:**

- “What does a dignified ending look like for you?”
- “How do you extract value without forcing a sale?”

## OPTION 8: LEGACY PRESERVATION EXIT

**Scoring Pattern:** High 29; mixed financial trade-offs

**Going Deeper:**

- “What are you unwilling to compromise?”
- “How would you define success beyond price?”

## OPTION 9: OPTION-BUILDING PHASE

**Scoring Pattern:** High 30; mixed signals elsewhere

**Going Deeper:**

- “What constraints, if removed, would change everything?”
- “What would make multiple futures possible?”



## About Purpose First Advisors

Purpose First Advisors helps business owners increase income, freedom, and long-term value by building companies that can grow and operate without relying on you being at the center of everything. Through strategic business advising, succession planning, and exit readiness, we help you strengthen profitability, reduce risk, and expand your options for the future.

Whether you plan to continue growing, step back from day-to-day operations, or eventually transition ownership, our work is designed to improve performance today while positioning your business for a successful and intentional next chapter.

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