

Problem

Models & Frameworks

Time Poor	Functionality Red, Blue, Black & Green
Major in Minor things	Big Rocks Functionality Ideal Week
Unhealthy	Wheel of Life Ideal Week
Not happy	Wheel of Life Drama Triangle
“Stuck” in business	Chaos to Greatness Stages Model
Want to build and sell	Chaos to Greatness Stages Model
Vision, goals	10-3-NOW 3-1-NOW EOS Big Rocks
Problem staff, recruiting	SCARF model Drama triangle
Accountability	Chaos to Greatness
Fair Vs equal	Estate Drawings Rule Book Constitution
Succession	10-20-100 Year Income, equity, control
Great life	4 L's – Live, Love, Learn, Legacy
No governance, no advisory	Risk Management frameworks
Business accountability skills	EOS Plans Chaos to Greatness
'All' too hard	Big Rocks Ideal Week Get context
Distribution & referral meeting	Scripts Engagement/Review document Positioning Statements
Business distribution	5 Step process Meet & greet to agreement
Frustrated in career – life and work	Innocence to integration Stages Model