Exit Planning Institute

# CEPA 120-DAY PLAYBOOK

## The Action Plan That Integrates Your Knowledge and Training into Practice

# INTRODUCTION

For a new CEPA, following this playbook will be a critical piece in your Beyond CEPA path. If implemented correctly, this playbook will allow you to integrate the process and concepts taught to you during your CEPA program into your practice. It will better position you in your networks as well as with your business owner prospects and clients.

## Meetings

The Accountability Meetings are self guided or group check-in meetings that last between 60 and 90 minutes.

Here you will walk through your progress and complete your checklists. There are 6 Accountability Meetings throughout the 120-day process.

**ACCOUNTABILITY MEETINGS**

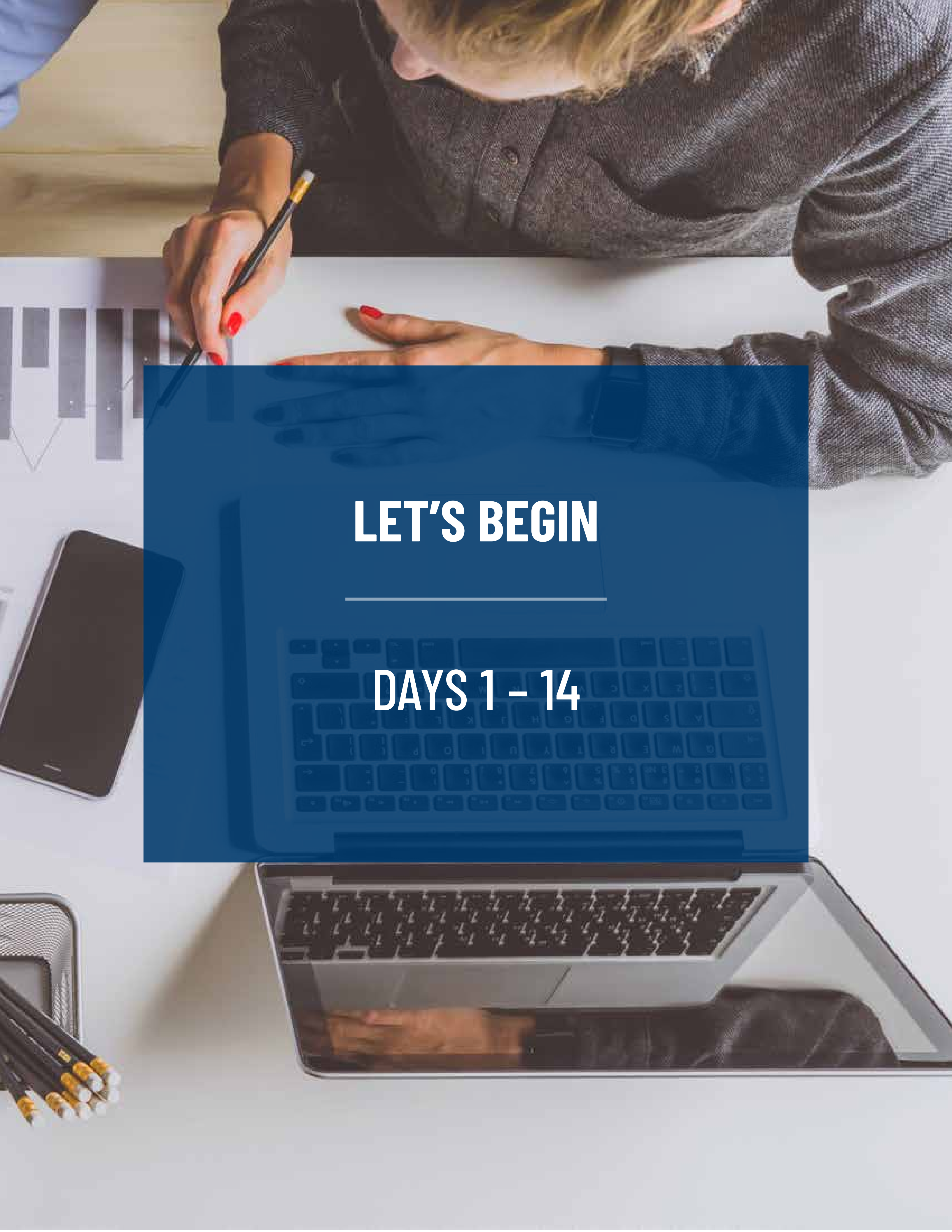
- 90-Minute Launch
- Beyond CEPA Call
- 30-Day Check-In
- 60-Day Check-In
- 90-Day Class Reunion
- 120-Day Completion

## Checklists

The Execution Checklists guide you through all the activities that you will need to do to integrate this new knowledge and training into your practice and brand. Complete these checklists as instructed and review them at your Accountability Meetings.

**EXECUTION CHECKLISTS**

- Launch
- 30-Day
- 60-Day
- 90-Day



# LET'S BEGIN

## DAYS 1 – 14

# 90-MINUTE LAUNCH
## Accountability Meeting 1

**Time: 90 minutes**

**You will complete Execution Checklist 1**

**Over the next 30 days begin to complete Execution Checklist 2**

This meeting is for you to begin to review your member center portal and consider how you may use the content within. This will allow you to frame your CEPA path and consider how you may want to implement the methodology, process, and concepts from the CEPA Program into practice, marketing, and conversations.

## CONSIDERATIONS

### MARKETING AND BIZ DEV

- What content do you want to utilize to make posts to LinkedIn, your Blog, or Facebook?
- Does this content need to be compliance approved?
- Do you currently do any speaking or teaching?
  *See presentations folder in Member Center*
- Do you have a knowledge center or resource center on your website you could utilize to post any content for your clients or prospects?
  *See assessment tools and research folders in Member Center*

### HOLISTIC CONVERSATIONS

- What tools or tactics am I utilizing to intrigue the owner?
- What tools or tactics am I utilizing to empower the owner?
- Can I describe and present the benefits of the methodology?
- Can I speak to the 3 legs of the stool?
- Can I speak to the 3 gaps?
- Can I speak to the 4Cs?

### WHAT TYPE OF CEPA AM I?

- Value Advisor Sole Service Consulting: An advisor who charges for exit planning work, typically in some or mid size consulting or M&A firm
- Value Advisor with a Multi-Service Firm: Charges for the work in part or in whole. Typically, a part of an accounting firm
- Influencer and Educator: Typically, does not charge for the work, but utilizes their training to have better conversations with owners, market themselves differently, and become a better collaborator and connector.

### FURTHER EDUCATION

- What do I need to know more about to be confident and comfortable?
- See Alliance Partners
- See EPI Academy
- See Archived Webinars in Member Center

# EXECUTION CHECKLIST 1

*Complete during the 90-minute meeting*

| COMPLETE | TASK |
|---|---|
| | Review the Member Center Portal and interact with the content within |
| | Place the CEPA mark next to your name on your signature lines, business cards, websites, and LinkedIn profile |
| | Revise and edit the Introductory Letters found in your CEPA Starter Kit |
| | Post your introductory letter for your COIs on your LinkedIn |
| | Follow Exit Planning Institute on LinkedIn |
| | Sign up for CEPA Think Tanks located in your Member Center |
| | Schedule your Beyond CEPA Call (Accountability Meeting #2) |
| | Schedule three, 60-minute meetings to watch the webinars: *Empowering Conversation Starters, Exit Solution Sales Funnel Mgmt., and How to Sell CEPA* |
| | Set 60 minutes for Accountability Meeting #3 on your calendar |

# EXECUTION CHECKLIST 2

*Complete over the next 30 days*

| COMPLETE | TASK |
|---|---|
| | Beyond CEPA Call (Accountability Meeting #2) |
| | Review and begin to implement the Marketing Tip Sheet found in the CEPA Starter Kit |
| | Send your introductory letters to your networks and business owner prospects/clients |
| | Begin to consider your CEPA Path: see page 10 |
| | Watch webinars listed above: see page 4 |

# BEYOND CEPA CALL

## ACCOUNTABILITY MEETING 2

# BEYOND CEPA CALL
## Accountability Meeting 2

**Time: 60 minutes**

**This meeting is scheduled and held live with fellow CEPAs from your program and the EPI Member Experience Team. The team will go through this 120-day playbook and dive deeper into the Member Center Portal. This is a great time to bring questions for the team or your fellow CEPAs.**

# 30 DAY CHECK-IN

## ACCOUNTABILITY MEETING 3

# 30 DAY CHECK-IN
## Accountability Meeting 3

**Time: 60 minutes**
**Complete Execution Checklist 2**
**Pick your CEPA Path**

**During this meeting you will do a self check-in. This meeting can also be held with your internal team at your firm. Review the progress of your last 30 days. Begin to understand which CEPA Path you want to go down and what type of CEPA you'd like to be. After this meeting you will begin to fill out your Business Planning Canvas.**

## CONSIDERATIONS

### ACCELERATE YOUR PRACTICE

- The following educational programs and tools will allow you to advance yourself quicker and in a more intentional and deliberate way.
- Marketing Accelerator. www.EPIMMC.com Marketing for the Professional Advisor Masterclass

### HAVE YOU COMPLETED THE FOLLOWING TASKS?

- Beyond CEPA Call (Accountability Meeting #2)
- Review and begin to implement the Marketing Tip Sheet found in the CEPA Starter Kit
- Send your introductory letters to your networks and business owner prospects/clients
- Begin to consider your CEPA Path: see page 10
- Watch webinars listed above: see page 4

Download your Business Planning Canvas from the Member Center located in folder CEPA Starter Kit.

# PICK YOUR CEPA PATH

Each CEPA typically picks one of two paths. They are a value advisor who will manage and run the process, or they are an influencer and educator who will primarily teach the process. Each path has similar and unique features.

Read the following two paths and pick your path. Once you have done that, you can begin to fill out your business canvas and think about your practice now that you are a CEPA.

### VALUE ADVISOR

- The Value Advisor is someone who manages the process for the business owners. In some cases this advisor may charge for this work via a monthly retainer fee and/or the triggering event engagement fee. In other cases, the advisor may not charge for this work or may incorporate it into a success fee or financial planning fees. Regardless, the key element for the Value Advisor is that they manage the overall process.
- If you are a consultant or CPA, you may choose to conduct the Triggering Event Engagements, host educational workshops, and keep the client on a retainer during the Prepare Gate's 90-days sprints. You will quarterback the exit planning team for the owner like a project manager.
- You will either integrate these services into something you are currently doing, like a multi-service firm, or you will do this and this only like a consulting firm.

### INFLUENCER AND EDUCATOR

- The Influencer and Educator is someone who will not charge for exit planning services or integrate this into their practice as a service line. They likely have their eyes on their current revenue lines and are using their knowledge, designation, and association to EPI as a development and marketing tool. They may choose to manage the 90-day sprints in the Prepare Gate for the business owner, but they likely will not charge. They do not lead or charge for the triggering event engagement, but they may participate.
- This group is likely the financial advisors, wealth managers, attorneys, commercial or business bankers, or insurance professionals. They want to get involved early on, have a seat at the table, and attract new clients while integrating into exit planning teams.

# EXECUTION CHECKLIST 3

*Complete over the next 30 days*

## Value Advisor Path

| COMPLETE | TASK |
|---|---|
| | Watch the Mastering the Triggering Event Web Series: *Understanding Value* (located in your Member Center). |
| | Conduct Triggering Event Engagement software product reviews and demos.<br>• MAUS Business Systems<br>• Quist Insights<br>• Value Opportunity Profile<br>• Value Builder System<br>• BizEquity |
| | Begin posting regularly on LinkedIn utilizing content from the Member Center. |
| | Begin updating your website to include downloadable content from the Member Center. |
| | Identify your referral base and your more strategic partners. These are the people you will host an advisory dinner and potential owner roundtables with. |
| | Purchase a box of *Walking to Destiny* for a gifting strategy as you begin your conversations with business owners and advisors. |

# EXECUTION CHECKLIST 3

*Complete over the next 30 days*

## Influencer / Educator Path

| COMPLETE | TASK |
|---|---|
| | Get involved with your local chapter. If you don't have one, contact your Member Experience Representative to understand if starting one is right for you. |
| | Begin changing your conversation by incorporating these conversational tools located in your member center portal.<br>• 3 Gaps one-pager<br>• Are You Ready Survey<br>• Business Readiness Scorecard<br>• 4Cs Chapter 7 from Walking to Destiny |
| | Begin posting regularly on LinkedIn utilizing content from the Member Center. |
| | Begin updating your website to include downloadable content from the Member Center. |
| | Identify your referral base and your more strategic partners. These are the people you will host an advisory dinner and potential owner roundtables with. |
| | Purchase a box of *Walking to Destiny* for a gifting strategy as you begin your conversations with business owners and advisors. |
| | Contact your Member Experience Representative to make introductions for you to Value Advisors. These will be key partnerships. |

# 60 DAY CHECK-IN

## ACCOUNTABILITY MEETING 4

# 60 DAY CHECK-IN

## Accountability Meeting 4

**Time: 60 minutes**

**Complete Execution Checklist 3**

**Review and begin executing on Execution Checklist 4**

**During this meeting you will do a self check-in. This meeting can also be held with your internal team at your firm. Review the progress of your last 30 days.**

**A key element of the past 30 days is that you should have completed your Business Planning Canvas and have begun executing your path.**

## CONSIDERATIONS

### ACCELERATE YOUR PRACTICE

The following educational programs and tools will allow you to advance yourself quicker and in a more intentional and deliberate way.

- Owner Roundtable Toolkit
  Contact Member Experience at
  *memberexperience@beyondcepa.com*
- Marketing Accelerator
  Marketing for the Professional Advisor Masterclass
  *www.EPIMMC.com*

### HAVE YOU COMPLETED THE FOLLOWING TASKS?

- Begin posting regularly on LinkedIn utilizing content from the Member Center
- Begin updating your website to include downloadable content from the Member Center
- Identify your referral base and your more strategic partners. These are the people you will host an advisory dinner and potential owner roundtables with.
- Purchase a box of *Walking to Destiny* for a gifting strategy as you begin your conversations with business owners and advisors

### Value Advisor Path

- Watch the Mastering the Triggering Event Web Series: Understanding Value (located in your Member Center)
- Conduct Triggering Event Engagement software product reviews and demos

### Influencer / Educator Path

- Get involved with your local chapter. If you don't have one, contact your Member Experience Representative to understand if starting one is right for you
- Begin changing your conversation by incorporating these conversational tools located in your member center portal
- Contact your Member Experience Representative to make introductions for you to Value Advisors. These will be key partnerships.

# EXECUTION CHECKLIST 4

*Complete over the next 60 days*

## Value Advisor Path

| COMPLETE | TASK |
|---|---|
| | Attend the 90-Day Class Reunion call hosted by the EPI Member Experience Team |
| | Purchase *Mastering the Triggering Event Workshop* |
| | Select, purchase, and onboard your *Triggering Event Engagement* software tool |
| | Decide what your suit of services are and determine your pricing model |
| | Select location for your advisory dinner |
| | Send invites for your advisory dinner |
| | Attend CEPA Think Tank sessions |
| | Setup your owner roundtable series by selecting your content, location, and speaker partners |
| | Send *Walking to Destiny* books to business owners to schedule meetings and bring to roundtables |
| | Begin your website improvements |
| | Watch the following webinars located in your Member Center<br>• Mastering the Triggering Event Series: Strategic Value Enhancement<br>• Grow Your Circle of Influence<br>• Social Media Simplified<br>• Dissecting the Triggering Event<br>• How to Commercialize Your CEPA and Credentials<br>• Conducting Successful Virtual Roundtables |

# EXECUTION CHECKLIST 4

*Complete over the next 60 days*

## Influencer / Educator Path

| COMPLETE | TASK |
|---|---|
| | Attend the 90-Day Class Reunion call hosted by the EPI Member Experience Team |
| | Select the value advisors that you would like to refer work to |
| | Select location for your advisory dinner |
| | Send invites for your advisory dinner |
| | Attend CEPA Think Tank sessions |
| | Setup your owner roundtable series by selecting your content, location, and speaker partners |
| | Send *Walking to Destiny* books to business owners to schedule meetings and bring to roundtables |
| | Begin your website improvements |
| | Schedule speaking engagements. Arm yourself with presentations and exercises from the Member Center |
| | Watch the following webinars located in your Member Center<br>• Grow Your Circle of Influence<br>• Social Media Simplified<br>• How to Commercialize Your CEPA and Credentials<br>• Conducting Successful Virtual Roundtables |

# 90 DAY CLASS REUNION

## ACCOUNTABILITY MEETING 5

# 90 DAY CLASS REUNION

## Accountability Meeting 5

**Time: 60 minutes**

**This meeting is scheduled and held live with fellow CEPAs from your program and the EPI Member Experience Team. Check in with your fellow classmates and see where they are, get your questions answered, and learn best practices.**

# 120 DAY COMPLETION

## ACCOUNTABILITY MEETING 6

# 120 DAY COMPLETION

## Accountability Meeting 6

**Time: 60 minutes**

**Complete Execution Checklist 4**

**During this meeting you will do a self check-in. This meeting can also be held with your internal team at your firm. Review the progress of your last 60 days.**

## CONSIDERATIONS

### HAVE YOU COMPLETED THE FOLLOWING TASKS?

- Attend the 90-Day Class Reunion call hosted by the EPI Member Experience Team
- Select location for your advisory dinner
- Send invites for your advisory dinner
- Attend CEPA Think Tank sessions
- Setup your owner roundtable series by selecting your content, location, and speaker partners
- Send *Walking to Destiny* books to business owners to schedule meetings and bring to roundtables
- Begin your website improvements
- Watch the webinars located in your Member Center

### Value Advisor Path

- Purchase *Mastering the Triggering Event Workshop*
- Select, purchase, and onboard your *Triggering Event Engagement* software tool
- Decide what your suit of services are and determine your pricing model

### Influencer / Educator Path

- Select the value advisors that you would like to refer work to
- Schedule speaking engagements. Arm yourself with presentations and exercises from the Member Center

# BEYOND THE PLAYBOOK

# BEYOND THE PLAYBOOK

## OVER THE LAST 120 DAYS

- Began integrating the process and concepts into your regular conversations with business owners
- Hosted your advisory dinners showcasing your new skillset and vision to your network for referrals
- Began improvements to your website, social media platforms and profiles, and email campaigns
- Interacted with fellow CEPAs learning best practices and building potential referral relationships
- Toured the Member Center and utilized your Member Experience Representative
- Further educated yourself through the Member Center content and webinars
- Integrated exit planning into what you do for owners either by becoming a Value Advisor or Influencer Educator
- Completed your Business Planning Canvas giving you a roadmap to successful implementation and practice building

## WHAT'S NEXT?

Continue to advance your knowledge base, skillset and network through:

- The Exit Planning Summit & Conferences
- Chapter Network Meetings
- CEPA Think Tanks
- Monthly Webinars
- Monthly Member Roundup
- EPI Academy Courses

Continue to advance your marketing and business development through:

- Educating business owners via roundtable series
- Building a robust knowledge center on your websites that captures owners
- Gifting books that allow you to engage, intrigue and empower owners
- Continuously talking about exit planning via social media platforms like LinkedIn by utilizing Member Center Content
- Building your referral network inside and outside of the EPI Community

Get involved in the EPI Community

- Contribute content to the Member Contributed Content section of the Member Center showcasing yourself as a thought leader
- Host webinars for the EPI Community
- Speak at events
- Attend events
- Regular communication with your Member Experience Representative