



CEPA[®] Development Scorecard

Track your progress and growth by completing the CEPA Development Scorecard at each of the three phases, ensuring a comprehensive approach to mastering exit planning strategies.

PHASE ONE	Exit Planning Summit	Empowering Conversations With Business Owners	Team Building Quiz (Coming Soon)
	120-Day Playbook	Think Tanks	CEPA Launched on LinkedIn
	Exit Planning Software Tool	Health Report Tool	CEPA Launched on Website
	Credentialed Plus	Business Valuation Through the Value Acceleration Methodology™	120-Day Playbook Course
	VAM Language Tutorial	Making Referrals Predictable	Beyond CEPA Next Steps Call
	Team Building: Defining Well Functioning Teams		
PHASE TWO	Project Management Tool	Selling to Business Owners	Conducting Effective Client Workshops
	Attend Mastering the Triggering Event Academy Course	Pricing Strategies Tutorial	Effective Branding Workshop
	CEPA Accelerator		
PHASE THREE	VAM Management Tool	Attend Mastering the Triggering Event Workshop at the Summit	Tap Into Your Quiet Confidence and Unlock Engagement Potential
	CVGA Credential or Equivalent	The 21-Step Guide to Succession and Exit Planning	Accelerate Your Exit Planning Practice
	Practice Launch Lite		

COLOR KEY

Tools	Academy Courses	Positioning CEPA	Advancement
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