

Legacy Builder's Blueprint – DIY IMPLEMENTATION WORKBOOK

Companion Workbook

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How to Use This Workbook

Welcome! I created this workbook so you can implement the **Legacy Builder Method™** exactly the way I guide my private clients. Each section starts with a short orientation from me, followed by fill-as-you-go templates, reflection prompts, and proprietary frameworks.

Best Practice: schedule a 90-minute focus block each week to complete the exercises. By the end of 90 days you'll have a leaner, system-run company and more freedom in your calendar.

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(Page numbers adjust on export.)

1. Legacy Health Scorecard – Master Log

Scorecard Navigator

Most owners *feel* the chaos but can't *measure* it. This scorecard turns feelings into data so you can see progress quarter after quarter.

Instructions

1. Complete the 15-question scorecard from the Blueprint.
2. Transfer each answer below.
3. Re-take every 90 days.

Quarter / Date	Question Scores (1–5 points each)	Results
	Q1: ____ Q2: ____ Q3: ____ Q4: ____ Q5: ____ Q6: ____ Q7: ____ Q8: ____ Q9: ____ Q10: ____ Q11: ____ Q12: ____ Q13: ____ Q14: ____ Q15: ____	Total: ____ Stage: ____
	Q1: ____ Q2: ____ Q3: ____ Q4: ____ Q5: ____ Q6: ____ Q7: ____ Q8: ____ Q9: ____ Q10: ____ Q11: ____ Q12: ____ Q13: ____ Q14: ____ Q15: ____	Total: ____ Stage: ____
	Q1: ____ Q2: ____ Q3: ____ Q4: ____ Q5: ____ Q6: ____ Q7: ____ Q8: ____ Q9: ____ Q10: ____ Q11: ____ Q12: ____ Q13: ____ Q14: ____ Q15: ____	Total: ____ Stage: ____

Stage Key



Crisis (15-30)

Urgent intervention needed



Stuck (31-45)

Significant challenges present



Strained (46-59)

Improvement opportunities exist



Scaling (60-75)

Business positioned for growth

Reflection

Which pillar dragged your score down the most? _____

Top 3 areas to focus on for improvement: _____

2. 15-Minute Bottleneck Finder

Bottleneck Spotlight 🔍

Before you automate anything, locate the *few* tasks sucking up the *most* time, money, or sanity.

Steps

- 1. Set a 15-minute timer.
- 2. Brain-dump every friction point you notice in a normal week.
- 3. Score *Pain* (1 low / 5 high) and *Frequency* (events per week).
- 4. Calculate **Impact Score = Pain × Frequency** – the largest numbers are your priority.

#	Task / Process	Pain 1-5	Freq (×/wk)	Impact	Time Lost (min)	\$\$ Lost / Issue	First Fix Idea
1							
2							
3							

Next – Move the top two Impact items to the Pareto Sheet (Section 3).

3. Root-Cause Pareto Sheet

Root-Cause Radar 🌳

The **Pareto Principle (80/20 Rule)** observes that roughly 80 % of valuable outcomes (profits, time saved) stem from about 20 % of inputs (critical tasks or root causes). In practice, a handful of chronic issues create the majority of delays, costs, or stress. This worksheet guides you to isolate that vital 20 %—so every fix you deploy delivers maximum leverage.

Bottleneck (from Sec 2)	5 Whys Analysis	Root Cause	Counter-meas ure	Owner	Due Date
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What low-cost experiment will you run this week to validate your counter-measure?

(from Sec 2)	5 Whys (bullet or fishbone)	Root Cause You Discovered	Counter-meas ure	Owner	Due Date
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What low-cost experiment can you run this week to prove your counter-measure works?

4. Meeting Rhythm Planner

Rhythm Architect

Meetings are either oxygen or carbon monoxide for culture. Structure them so people leave with clarity, not confusion.

Template

Meeting	Cadence	Participants	Agenda Blocks (time)	Prep Required	Success KPI
Daily Huddle	10 min	All staff	Wins (2) Priorities (5) Roadblocks (3)	Numbers ready	95 % tasks clear
Weekly Ops					
Monthly Exec					

Guidance – Block recurring meetings on the Covey planner (Section 6) before the week starts.

5. SOP Builder One-Pager

System Blueprint Guide

Your business becomes sellable when the know-how lives on paper, not in people's heads. Below you'll find **a blank template** to draft your own SOP and **a fully filled sample** so you can see what "good" looks like.

Blank SOP Template

Field	Your Process Details
Process Name	
Department / Owner	
Trigger Event	
Definition of Done / KPI	
Step-by-Step Checklist	1. 2. 3. 4. 5.
Tools / Links	
Review Cycle	

Sample SOP – "On-Board New Client"

Field	Example
Process Name	On-Board New Client
Department / Owner	Sales Ops – Jann D.
Trigger Event	Signed contract received in CRM
Definition of Done / KPI	Welcome email sent & kickoff scheduled within 48 hrs
Step-by-Step Checklist	1. Verify signed contract is uploaded. 2. Create client record in CRM. 3. Generate onboarding folder in SharePoint. 4. Send welcome-packet email. 5. Schedule kickoff meeting.
Tools / Links	HubSpot record link, Welcome-packet template
Review Cycle	Quarterly

Process Name	On-Board New Client
Department/Owner	Sales Ops – Jann
Trigger Event	Signed contract received
Definition of Done	Client live in CRM + welcome email sent
Checklist Steps	1 Verify paperwork 2 Create account 3 Schedule kickoff
Key Metric	Time from contract to kickoff ≤ 48 hrs
Tools / Links	HubSpot link, Welcome template
Review Cycle	Quarterly

6. Covey-Legacy Time-Block Planner

Time Mastery Map 🕒

The Covey Time Management Matrix (a.k.a. Covey Method) originates from Stephen R. Covey's *The 7 Habits of Highly Effective People*. It classifies every task into four quadrants based on **Urgency** and **Importance**:

Quadrant	Label	What It Means	Typical Examples
Q1	Urgent + Important	Immediate crises & hard deadlines	Client outage, tax filing due today
Q2	Not Urgent + Important	Strategic, preventive, relationship-building work	SOP creation, team coaching, product R&D
Q3	Urgent + Not Important	Other people's "hair-on-fire" tasks	Random Slack pings, unnecessary approvals
Q4	Not Urgent + Not Important	Distractions & time-wasters	Endless scrolling, busywork reports

Why it matters for legacy-driven CEOs: Sustainable scale happens when you push routine tasks out of Q1/Q3 and deliberately schedule more Q2 work—systems, training, vision. Less firefighting, more future-building.

Practical Use Case After mapping his week, *Tom (60-year-old founder)* discovered only 6 % of his hours were Q2. By blocking two 90-minute Q2 focus sessions weekly and delegating a Q3 admin task, he freed 7 hours for strategic sales work—fueling a 30 % revenue jump within two quarters.

Guidelines for this planner:

- 1. Colour-code calendar blocks: **Green = Q2, Orange = Q1, Grey = Delegate/Automate (Q3 & Q4)**.
- 2. Complete the grid every Friday for the coming week.
- 3. Aim for at least 10 strategic (Q2) hours weekly; review after 4 weeks.

Colour-code your week: **Green = Strategic (Q2), Orange = Urgent-Important (Q1), Grey = Delegate/Automate.**

Time \ Day	Monday	Tuesday	Wednesday	Thursday	Friday
8–10 AM					
10–12 PM					
1–3 PM					
3–5 PM					

Which tasks in orange can you move to green or grey next quarter?

7. KPI Dashboard Template

Metrics Lens

"What gets measured gets managed" only works if you *see* the numbers every week.

Metric	Target	Current	Trend ↑/↓	Owner	Review Day
MRR	\$				Friday
Gross Margin	%				
Lead-to-Close	%				
NPS					
Cycle Time (days)					

Tip – Use conditional formatting in Google Sheets for instant green/yellow/red status.

8. 90-Day Implementation Roadmap

Momentum Map 🌍

Big change without a timeline is just a wish. Plot milestones so momentum never stalls.

Week	Focus Goal	Key Tasks	Responsible	Status (R/Y/G)
1				
2				
...				
12				

What reward will you or your team earn at Week 12 if the roadmap is green?

9. Action-Plan & Accountability Log

Turn intentions into results with clear ownership and deadlines that drive execution.



Task Definition

Clearly define each implementation task with specific deliverables and measurable outcomes to eliminate ambiguity.



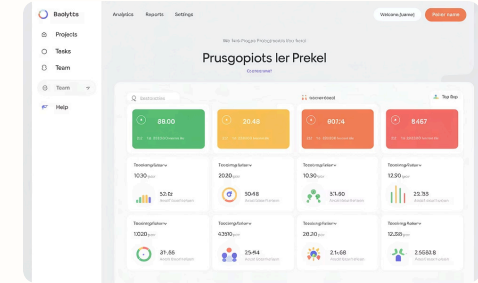
Timeline Management

Set realistic deadlines with buffer time built in. Track start dates and completion dates to maintain momentum.



Responsibility Assignment

Designate a single accountable owner for each task to ensure clear ownership and prevent execution gaps.



Progress Tracking

Update status weekly using Red/Yellow/Green indicators to quickly identify where intervention is needed.

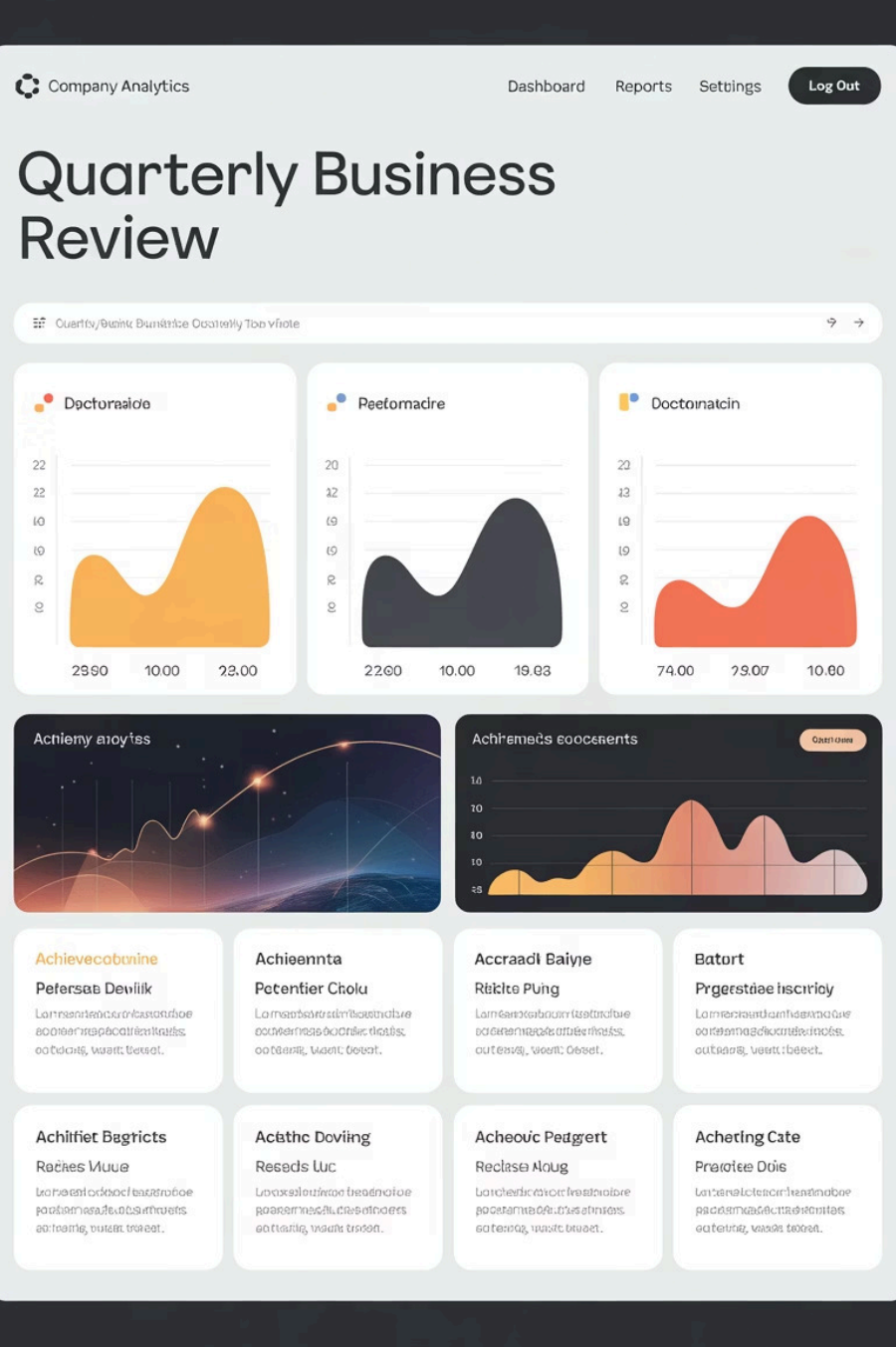
Pro Tip: Review this log in your weekly leadership meeting to maintain accountability and quickly address bottlenecks before they derail your 90-day implementation.

9. Action-Plan & Accountability Log

Execution Catalyst

Execution beats ideas 100 % of the time. Use this log to keep promises visible.

Date	Action Item	Pillar	Impact \$ / hr	Owner	Due	Done? 	Notes
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10. Quarterly Progress Review & Next Steps

Quarterly Summit Guide 🏁

Every 90 days pause, celebrate wins, mine lessons, and set the next mountain.

1. Wins this quarter:

Quarterly Progress Review Continued

This section provides additional space to document your quarterly wins and achievements. Use this area to expand on the successes you've experienced during the implementation of the Legacy Builder Method™.

Business Wins

Document revenue increases, new clients acquired, or systems successfully implemented.

Team Wins

Note improvements in team performance, successful delegations, or new hires that have made an impact.

Personal Wins

Record improvements in your work-life balance, stress reduction, or personal growth achievements.



Quarterly Progress Review Continued

Continue documenting your quarterly wins in this section. Remember to be specific about the outcomes and impacts of each achievement.

- 1

Month 1 Highlights

Key accomplishments and milestones from the first month of implementation.
- 2

Month 2 Highlights

Progress made during the second month and any notable breakthroughs.
- 3

Month 3 Highlights

Final month achievements and completion of quarterly goals.



Lessons Learned Documentation

1. **Lessons learned:**

What Worked Well

Document the strategies, systems, or approaches that produced positive results and should be continued or expanded.

- What was your Strategy(ies) used?
- What System(s) did you implement?
- What was your Approach(es)?

What Could Be Improved

Note the areas where challenges arose and identify potential adjustments for the next quarter.

- What are Challenge(s) you found?
- Where did the Obstacle(s) lie?
- What are the Barrier(s) encountered?

Lessons Learned Continued

Use this section to further explore the lessons learned during your implementation journey. Documenting these insights will help refine your approach for the next quarter.



Insight Discovery

What unexpected learnings emerged during implementation?



Problem Solving

How did you overcome obstacles that appeared during the quarter?



Performance Analysis

What metrics showed improvement and which need more attention?



Future Application

How will these lessons inform your strategy going forward?

Additional Lessons Learned

Continue documenting the valuable lessons from your implementation experience. Be thorough in capturing insights that will guide future improvements.

Process Insights

Learnings about your operational workflows and systems



Customer Insights

Learnings about client needs, satisfaction, and retention



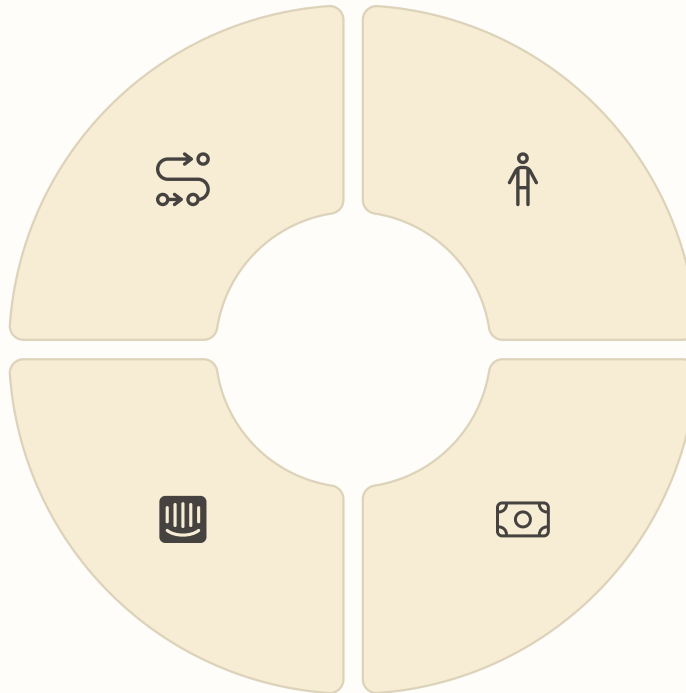
Team Insights

Discoveries about delegation, communication, and collaboration



Financial Insights

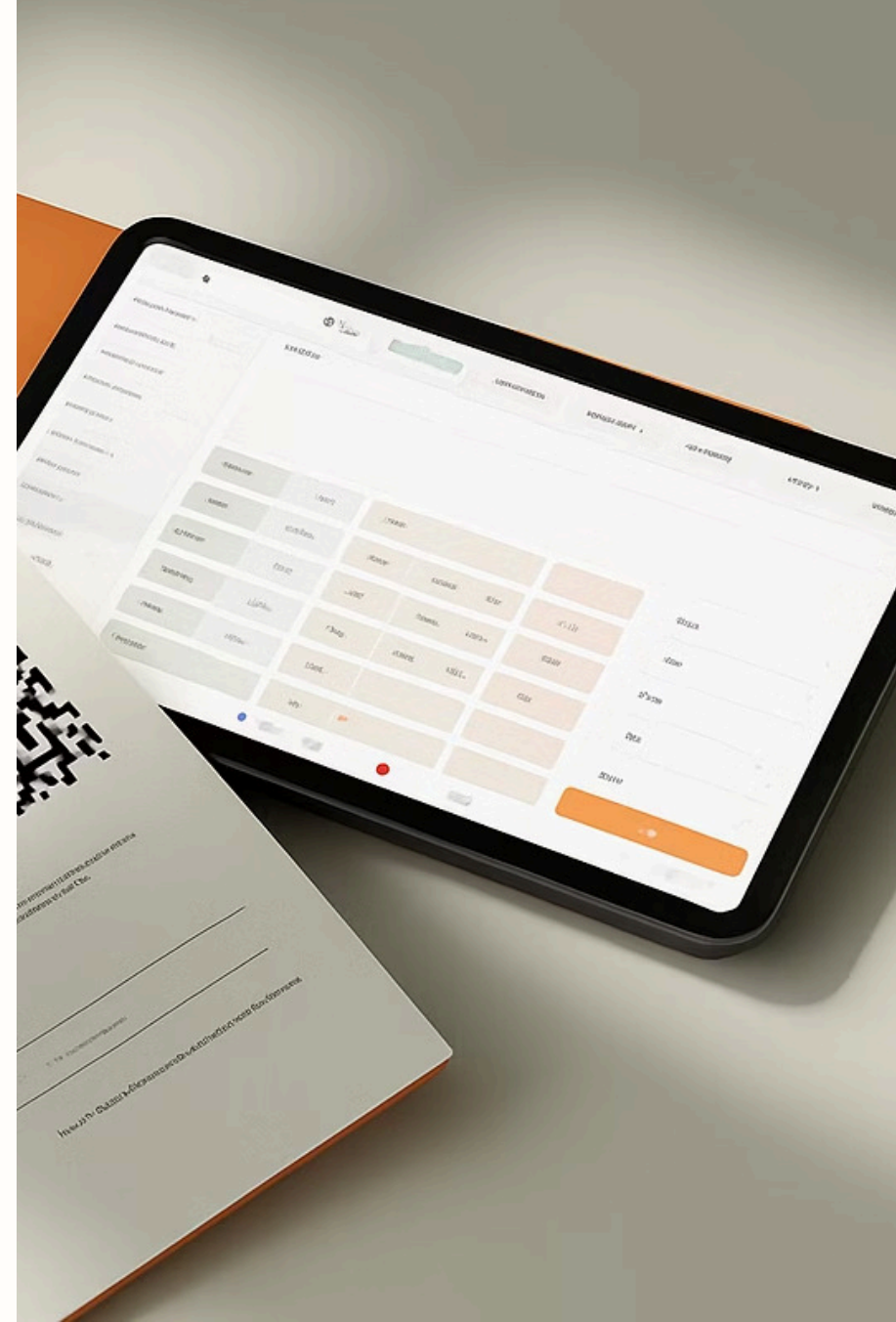
Observations about revenue streams, expenses, and profitability



Re-Take the Quiz

Now re-take the quiz to check your progress and identify areas that need improvement.

Take the 2-Minute Quiz



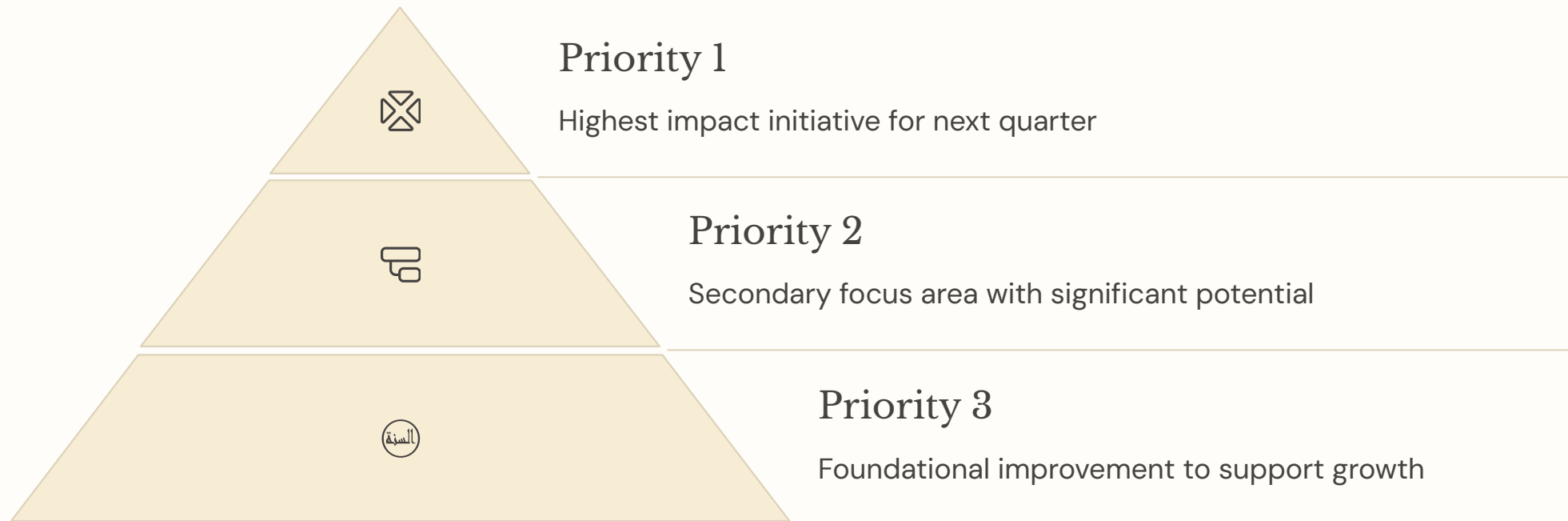
Progress Summary and Next Steps

1. **Legacy Health Score change:**

From

to

2. **Next 3 priorities:**



Document your specific priorities in detail below, including key actions, responsible owners, and expected outcomes for each.

Implementation Planning for Next Quarter

Use this final section to outline your detailed action plan for the upcoming quarter based on your identified priorities.

Define Specific Goals

Translate your priorities into measurable objectives with clear success criteria.

Create Detailed Action Plans

Break down each priority into specific tasks, assign owners, and set deadlines.

Establish Tracking Mechanisms

Determine how you'll monitor progress and what indicators will show you're on track.

Schedule Implementation Reviews

Set regular check-in points to evaluate progress and make necessary adjustments.

Remember to transfer your priorities to your 90-Day Implementation Roadmap (Section 8) and your Action-Plan & Accountability Log (Section 9) to ensure consistent tracking and execution.

Next Steps

Ready for a deeper dive? Book your [30-min Clarity Call](#) or upgrade to the [\\$497 Business Audit Intensive](#) (click the link or scan the QR).

