

Asset 4

Light-Touch 30-Day Advisor Check-In Cadence

How to Stay Connected Without Interfering During the Owner-Only Experience

OptionBuilt™ Owner Activation System

Advisor Toolkit Asset 4: Light-Touch 30-Day Advisor Check-In Cadence

How to Stay Connected Without Interfering During the Owner-Only Experience

Purpose of This Tool

This tool helps approved OptionBuilt™ Advisor Network partners stay lightly connected while an owner is participating in the private 30-day owner-only experience.

The advisor ask is simple:

Send a few light check-ins. Encourage the owner to complete the process. Do not ask for partial work. Do not add extra homework. Schedule the post-experience roadmap review.

That's it.

Greg and Cara guide the owner through the 30-day experience.

The advisor stays connected from the outside, protects momentum, and reviews the owner's Execution Roadmap after the experience is complete.

The Big Idea

Stay Visible, Not Heavy

The owner is already doing the work inside the OptionBuilt™ experience.

Your job is not to lead, coach, explain, or facilitate.

Your job is to stay visible enough that the owner feels supported, without becoming another demand on their time.

Best practice:

Use short texts for light encouragement. Use email when the message needs more context. Avoid phone calls unless the owner asks for one or something is urgent.

Owners are more likely to see a text than answer a call or find an email buried in their inbox.

The text creates the touch.

The email carries the fuller message when needed.

The Simple 30-Day Cadence

Use five light touches.

Touch 1: Before the Cohort Starts

Purpose: Reinforce the opportunity and schedule the post-experience review.

Method: Email + text.

Advisor action: Get the review on the calendar for 7–10 days after the 30-day experience ends.

Thematic Flow

Your message should communicate:

The goal is a usable Execution Roadmap, not a perfect plan.

Greg and Cara will guide the process.

The owner should keep the daily prep simple and show up for the weekly sessions.

You want to protect time after the 30 days to review the roadmap while it is fresh.

Email

Subject: Before your OptionBuilt™ 30-day experience starts

Hi [First Name],

I'm glad you're taking advantage of the private 30-day owner-only experience through OptionBuilt™.

The goal is not to solve everything in 30 days or create a giant plan. The goal is to help you build a clear, simple Execution Roadmap that connects what you want personally, what the business needs to become, and what financial planning should support next.

My recommendation is to stay with the rhythm Greg and Cara lay out. Keep the daily prep simple, show up for the weekly sessions, and use the Execution Guide to capture what matters most.

Let's also protect time shortly after the experience ends to review your roadmap while the work is fresh.

Best, [Advisor Name]

Text

Just sent you a quick email before your OptionBuilt™ 30-day experience starts. Nothing heavy — just a reminder to keep it simple, follow Greg and Cara's rhythm, and protect time afterward so we can review your roadmap.

Touch 2: End of Week 1

Purpose: Encourage momentum.

Method: Text only.

Advisor action: Do not ask what they wrote, discovered, or plan to do.

Thematic Flow

Your message should communicate:

Week 1 is about awareness, not answers.

The owner should keep capturing what stands out.

The process will become clearer as they go.

Text

Hope Week 1 was useful. Early on, the goal is awareness, not answers. Keep capturing what stands out and let the process do its job.

Touch 3: End of Week 2 / Midpoint

Purpose: Keep the owner from overcomplicating the work.

Method: Email + text.

Advisor action: Schedule the post-experience review now if it is not already scheduled.

Thematic Flow

Your message should communicate:

This is not about solving everything.

The owner is identifying the clearest next actions.

The roadmap should show what belongs with the owner and internal team, and what belongs with advisors.

Clear and usable beats perfect.

Email

Subject: Quick midpoint check-in
Hi [First Name],

I hope the 30-day experience has been useful so far.

At the midpoint, I'd keep reminding yourself that this is not about solving everything. It is about identifying the clearest next actions.

The roadmap will be most useful if it helps you see what belongs with you and your team, what belongs with your advisors, and what should move into the next 90 days.

Keep it simple. Clear and usable beats perfect.

Best, [Advisor Name]

Text

Quick midpoint note in your inbox. Main idea: clear and usable beats perfect. Stay with the process and keep capturing what should come back to your team/advisors after the 30 days.

Touch 4: End of Week 3 / Final Stretch

Purpose: Prepare the owner for the post-experience review without taking over.

Method: Text only.

Advisor action: Do not ask to see the roadmap yet.

Thematic Flow

Your message should communicate:

Start noticing what belongs with the internal team.

Start noticing what belongs with the advisor team.

That distinction will make the roadmap review more useful.

Text

As you head into the final stretch, pay attention to what belongs with your internal team and what belongs with your advisor team. That will make our roadmap review much more useful.

Touch 5: Completion / Review Setup

Purpose: Celebrate completion and move into the advisor review.

Method: Email + text.

Advisor action: Confirm the review meeting and ask the owner to bring only what is needed.

Thematic Flow

Your message should communicate:

Completion is meaningful because most owners never slow down long enough to connect the pieces.

The next step is reviewing the Execution Roadmap.

The meeting is not about solving everything.

The goal is to identify the clearest next actions and who should own them.

Email

Subject: Next step after your OptionBuilt™ experience
Hi [First Name],

Congratulations on completing the 30-day OptionBuilt™ experience.

That is a meaningful step because most owners never slow down long enough to connect what they want personally, what the business needs to become, and what financial planning should support next.

The next step is for us to review your Execution Roadmap and identify where my planning work, and the rest of your advisor team, can help.

We do not need to solve everything in that meeting. We need to identify the clearest next actions and who should own them.

Please bring your Execution Roadmap, your top priorities across Personal Freedom, Business Freedom, and Financial Freedom, and any questions you believe belong with the advisor team.

Best, [Advisor Name]

Text

Congrats again on completing the 30-day OptionBuilt™ experience. I sent a quick email about the next step — reviewing your Execution Roadmap and identifying the clearest actions from my lane and with your broader advisor team.

If the Owner Asks for Help During the 30 Days

Keep the response simple.

If It Belongs Inside the Cohort

Say:

“That is a great question to bring into the cohort. Greg, Cara, and the owner group are there to help you work through that part. I do not want to answer too quickly and pull you out of the process.”

If It Belongs to the Advisor Team Later

Say:

“That sounds like something we should capture for our post-experience review. I do not want to jump ahead while you are still building the roadmap, but it is exactly the kind of item we should bring back to the advisor team.”

If It Is Urgent

Say:

“If this is time-sensitive, we should not wait until the 30 days are over. Let’s involve the right professional now.”

What to Avoid

Do not send messages that create more work or pull the owner out of the process.

Avoid:

“Can you jump on a quick call?”
“Send me your workbook so I can review it.”
“What did Greg and Cara tell you?”
“I can help you fill out the guide.”
“Here’s another planning worksheet.”
“Let’s start implementing now.”
“What tax, investment, or insurance issues came up?”

The owner should finish the 30-day process first.

Then you review the roadmap.

Advisor Checklist

Before the Cohort Starts

- Send Touch 1 email [] Send Touch 1 text [] Schedule the post-experience review for 7–10 days after completion

During the 30 Days

- Send Week 1 text [] Send midpoint email + text [] Confirm review is scheduled [] Send Week 3 text [] Do not ask for partial work

After Completion

- Send completion email + text [] Confirm review meeting [] Ask owner to bring Execution Roadmap and top priorities [] Use the review to identify the clearest next actions from your lane

Key Reminder

The advisor's job during the 30 days is not to lead.

It is to stay lightly connected, encourage completion, and protect the post-experience review.

The owner does not need another meeting.

They need momentum.

Once the Execution Roadmap is built, the advisor conversation becomes much more valuable.