

Asset 10

Advisor Implementation Checklist

How to Launch the Owner Activation System in the Next 30 Days

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OptionBuilt™ Owner Activation System

Advisor Toolkit Asset 10: Advisor Implementation Checklist

How to Launch the Owner Activation System in the Next 30 Days

Purpose of This Tool

This tool helps approved OptionBuilt™ Advisor Network partners put the Owner Activation System into action.

The advisor ask is simple:

Build your First 20 list. Prioritize your First 5. Invite owners into the Personal Freedom Score™. Run simple score conversations. Hand off the book and Execution Guide when appropriate. Encourage qualified owners to consider the 30-day owner-only experience. Schedule roadmap reviews.

That's it.

The goal is not to learn the entire system before taking action.

The goal is to start the right conversations with the right owners.

The Big Idea

Start Small and Build Momentum

Do not try to launch this with every business owner you know.

Do not try to master every asset before you begin.

Start with the first five owners most likely to benefit.

Use the Personal Freedom Score™ as the front door.

Let the process create context.

Then follow the next step.

30-Day Implementation Plan

Week 1: Build Your First 20 List

Goal

Identify the first owners who may benefit from the Owner Activation System.

Actions

- ☐ Review Asset 1: First 20 Owner Conversations Checklist
- ☐ Build your list across the five owner buckets
- ☐ Identify existing clients, stalled opportunities, qualified prospects, past relationships, and referral partner opportunities
- ☐ Score the strongest candidates using the Owner Fit Scorecard
- ☐ Prioritize your First 5 owners

End-of-Week Outcome

You have a focused list of five owners to approach first.

Week 2: Invite Owners Into the Score

Goal

Start simple score-based conversations.

Actions

- ☐ Review Asset 2: Freedom Score Conversation Guide
- ☐ Send the Personal Freedom Score™ invitation to your First 5
- ☐ Use your advisor-specific Freedom Score™ link
- ☐ Offer to have the owner complete the score live when appropriate
- ☐ Follow up with owners who have not completed the score
- ☐ Schedule score debrief conversations with owners who complete it

End-of-Week Outcome

Your First 5 owners have been invited into the Personal Freedom Score™, and score debriefs are being scheduled.

Week 3: Run Score Debriefs and Make the Handoff

Goal

Use the score results to create context and introduce the next step.

Actions

- ☐ Use the AI-driven results page as the live conversation guide
- ☐ Use the PDF report as the owner's record

- ☐ Ask the three debrief questions: what did it confirm, expose, and prioritize?
- ☐ Do not turn the score into a planning pitch
- ☐ When appropriate, use Asset 3 to hand off the book and Execution Guide
- ☐ Point the owner to Chapter 3.5
- ☐ Let the owner know OptionBuilt™ will send cohort information directly
- ☐ Strongly encourage qualified owners to consider the 30-day owner-only experience

End-of-Week Outcome

Owners who completed the score understand the next step and have been introduced to the book, Execution Guide, and OptionBuilt™ follow-up pathway.

Week 4: Protect Momentum and Schedule Reviews

Goal

Make sure interested owners continue through the process and return for a meaningful advisor conversation.

Actions

- ☐ Track which owners received OptionBuilt™ cohort information
- ☐ Follow up lightly with owners considering the cohort
- ☐ Use Asset 4 once an owner joins the 30-day experience
- ☐ Schedule post-experience roadmap reviews 7–10 days after completion
- ☐ Use Asset 7 to identify one or two referral partners to educate
- ☐ Prepare to use Asset 5 for roadmap reviews
- ☐ Prepare to use Asset 6 to identify planning opportunities

End-of-Week Outcome

Owners who enter the 30-day experience have roadmap reviews scheduled, and you have started expanding the system through referral partners.

Simple Weekly Tracker

Week 1: First 20 / First 5

First 5 owners selected:

Week 2: Score Invitations

Owner 1: Sent / Completed / Debrief Scheduled
Owner 2: Sent / Completed / Debrief Scheduled
Owner 3: Sent / Completed / Debrief Scheduled
Owner 4: Sent / Completed / Debrief Scheduled
Owner 5: Sent / Completed / Debrief Scheduled

Week 3: Score Debriefs + Handoff

Owner 1: Debriefed / Book + Guide Handed Off / OptionBuilt™ Follow-Up Expected
Owner 2: Debriefed / Book + Guide Handed Off / OptionBuilt™ Follow-Up Expected
Owner 3: Debriefed / Book + Guide Handed Off / OptionBuilt™ Follow-Up Expected
Owner 4: Debriefed / Book + Guide Handed Off / OptionBuilt™ Follow-Up Expected
Owner 5: Debriefed / Book + Guide Handed Off / OptionBuilt™ Follow-Up Expected

Week 4: Cohort + Review

Owner 1: Considering / Joined / Review Scheduled
Owner 2: Considering / Joined / Review Scheduled
Owner 3: Considering / Joined / Review Scheduled
Owner 4: Considering / Joined / Review Scheduled
Owner 5: Considering / Joined / Review Scheduled

What to Use When

Use Asset 1 when:

You need to identify the first owners to approach.

Use Asset 2 when:

You are inviting the owner into the Personal Freedom Score™ or reviewing their results.

Use Asset 3 when:

The owner has completed the score and is ready for the book, Execution Guide, and next-step handoff.

Use Asset 4 when:

The owner joins the private 30-day owner-only experience.

Use Asset 5 when:

The owner completes the 30-day experience and you are reviewing their Execution Roadmap.

Use Asset 6 when:

You are translating the owner's roadmap into planning opportunities.

Use Asset 7 when:

You want referral partners to introduce owners into the system.

Use Asset 8 when:

You need simple follow-up email and text language.

Use Asset 9 when:

You need clarity on advisor roles, boundaries, and lanes.

What Not to Do

Do not try to launch with every owner at once.

Do not explain the full OptionBuilt™ ecosystem too early.

Do not skip the Personal Freedom Score™.

Do not turn the score into a planning pitch.

Do not over-follow-up during the 30-day experience.

Do not ask for partial work.

Do not let owners complete the 30-day experience without scheduling a roadmap review.

Do not overcomplicate the system.

Key Reminder

The Owner Activation System only works if advisors use it.

Keep the launch simple.

Start with five owners.

Use the score as the front door.

Let the process create context.

Schedule the roadmap review.

Then help the owner take the right next action from your lane.