

## Asset 2

# Freedom Score Conversation Guide

*How to Invite an Owner Into the Score and Use the Results to Start a Better Conversation*

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## OptionBuilt™ Owner Activation System

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### Advisor Toolkit Asset 2: Freedom Score Conversation Guide

How to Invite an Owner Into the Score and Use the Results to Start a Better Conversation

### Purpose of This Tool

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This tool helps approved OptionBuilt™ Advisor Network partners introduce the Personal Freedom Score™ and use the results to start a better, more business-relevant planning conversation.

The advisor ask is simple:

Invite the owner to take the score. Use the results to create context. Connect the report to business outcomes the owner already cares about. Do not turn the score into a planning pitch. Create the bridge to the next step.

That's it.

The Personal Freedom Score™ is the front door.

It gives the owner a quick snapshot of where their life, business, and financial world may already be aligned — and where gaps may exist.

The goal is not to diagnose everything.

The goal is to help the owner see enough value to keep going.

### The Big Idea

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#### The Score Creates Context

Most owner conversations stall because advisors start too far downstream.

They talk about tax planning, estate planning, wealth planning, insurance, liquidity, succession, or exit planning before the owner sees how those conversations connect to the business results they are trying to achieve right now.

The owner may agree the advice matters.

But agreement is not activation.

The Personal Freedom Score™ moves the conversation from:

*“Let me tell you what you need.”*

to:

*“Let's take five minutes and see what this reveals.”*

That is a much easier starting point.

## The Simple Sequence

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### 1. Invite the Owner Into the Score

Position the score as a five-minute snapshot, not a planning process.

### 2. Use the Advisor-Specific Link

The advisor-specific link matters because it creates attribution and keeps the owner connected to your pathway.

### 3. Review the Results

Use the AI-driven results page as the live conversation guide.

Use the PDF report as the owner's record.

### 4. Ask Better Questions

Do not over-diagnose.

Do not solve every issue.

Do not turn every gap into a planning recommendation.

### 5. Create the Bridge

Help the owner understand why continuing the process may be valuable.

Asset 3 handles the book, Execution Guide, and 30-day owner-only experience handoff.

## What the Owner Receives After Taking the Score

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After completing the Personal Freedom Score™, the owner receives:

**AI-Driven Results Page** This gives the owner immediate interpretation of their results and can guide the first conversation.

**PDF Report** This gives the owner a record of their overall score, category scores across Personal Freedom, Business Freedom, and Financial Freedom, all 30 yes/no answers, and next-step guidance.

The advisor does not need to outperform the report.

Your job is to help the owner connect what they are seeing to the business results they care about.

## Conversation Flow: Before the Score

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Use these points as the conversational flow. Do not over-script it.

### 1. Start With the Business

Connect to what the owner already cares about:

Growth Cash flow Leadership Owner dependency Enterprise value Transferability Succession  
Optionality Personal pressure

### 2. Name the Planning Disconnect

Planning often gets delayed because it feels disconnected from what the owner is trying to accomplish in the business.

### 3. Introduce the Score

The score is a five-minute snapshot that helps reveal where life, business, and financial alignment may be strong — and where gaps may exist.

### 4. Lower the Pressure

This is not a full assessment.

This is not a sales pitch.

This is not a planning engagement.

It is simply a better starting point.

### 5. Invite Action

Send the advisor-specific link, or have the owner complete it live if the timing is right.

## Short Invite Script

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Use this when you need to keep the conversation simple.

*“Before we jump into planning strategies, I’d like to start with something simpler. Most owners are so deep in the business that it’s hard to see where their life, business, and financial world are actually aligned — and where they may be working against each other.”*

*“I have a five-minute score that gives us a quick snapshot. It looks at Personal Freedom, Business Freedom, and Financial Freedom and helps identify where things may be strong and where there may be gaps worth discussing.”*

*“It is not a full planning process and it is not meant to solve everything. If it shows something useful, we’ll have a better conversation. If it doesn’t, no harm done.”*

*“Let’s start there. I’ll send you my link.”*

## If You Are Talking to an Existing Client

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Use this thematic flow:

You have already had conversations about the business, wealth, or next stage.

This score helps step back and see how those pieces fit together.

The better question is not only, “What planning do we need?”

The better question is, “What do you want the business to make possible, and what does the business need to become to support that?”

Then invite them into the score.

### Simple Language

*“We’ve had a few conversations about your business, your wealth, and what the next stage might look like. I think there may be value in stepping back for a few minutes and looking at how those pieces fit together. I have a five-minute score that can give us a quick snapshot and help us have a better conversation.”*

## If You Are Talking to a Prospect

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Use this thematic flow:

Most successful owners are building something valuable.

That does not always mean the business is creating freedom, optionality, or clarity.

The score gives a low-pressure way to see where life, business, and financial alignment may be strong or stuck.

Then invite them into the score.

### Simple Language

*“Most successful owners I meet are building something valuable, but that does not always mean the business is creating more freedom, optionality, or clarity. I have a five-minute score designed for business owners that gives us a quick snapshot of where things may be aligned and where there may be gaps worth discussing.”*

## If You Are Re-Engaging a Stalled Opportunity

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Use this thematic flow:

The issue probably was not whether the planning mattered.

The issue may have been that the planning did not feel connected enough to what the owner was trying to accomplish in the business.

Use the score as a lighter way to restart the conversation.

Then invite them into the score.

### Simple Language

*“I was thinking about our prior conversation. I don’t think the issue was whether the planning mattered. I think the bigger issue may have been that it was not clearly connected to what you were trying to accomplish in the business at the time. Rather than reopen the whole planning conversation from scratch, I’d suggest we start with something lighter — a five-minute score that gives us a better snapshot.”*

## Live Score Walkthrough

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Whenever possible, the best version is live.

That does not mean the advisor explains every question.

It means the advisor creates the space for the owner to complete the score while the conversation is fresh.

### Simple Language

*“This only takes about five minutes. If you have time, let’s just do it now. You’ll answer a series of yes/no questions across Personal Freedom, Business Freedom, and Financial Freedom. Then we can look at what it shows and decide whether there is anything useful to discuss.”*

If the owner wants to do it later:

*“No problem. I’ll send the link. When you take it, do it when you have a few quiet minutes. The value is not just the score itself. It is what the score helps us discuss afterward.”*

## Conversation Flow: After the Score

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Use these points as the debrief flow.

### 1. Let the Report Lead

Use the AI-driven results page as the live guide.

Use the PDF report as the owner's record.

Do not debate, defend, or over-interpret the score.

### 2. Ask What Stands Out

Let the owner tell you what they see before you interpret it.

### 3. Connect Back to Business Outcomes

Ask where the results may be affecting growth, cash flow, leadership, enterprise value, owner dependency, transferability, succession, optionality, or personal pressure.

### 4. Introduce the Flywheel Simply

Do not teach the whole framework.

Just connect the motion:

Personal clarity improves business decisions.

A stronger business creates more financial options.

More financial options reduce personal pressure.

Reduced pressure helps the owner lead and decide better.

### 5. Do Not Pitch Planning Yet

The score is not a bait-and-switch.

Do not immediately launch into planning recommendations.

Use the results to create understanding and bridge to the next step.

## Three Debrief Questions

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Use these after the owner completes the score.

### 1. What did the report confirm?

*"What part of this report feels most accurate to you?"*

or

*"What did this confirm that you already knew, but maybe had not put in one place?"*

### 2. What did the report expose?

*"What stood out that you maybe have not been paying enough attention to?"*

or

*"Which part feels more important now that you see it in writing?"*

### 3. What should be prioritized?

*“Rather than trying to solve everything, which one or two ‘No’ answers feel most important based on what you want the business to make possible over the next 90 days?”*

### Short Results Debrief Script

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Use this when you need to keep the conversation simple.

*“This gives us a useful snapshot. I would not try to solve all of this in one conversation. What matters is that we can now see how your personal goals, business priorities, and financial options are connected.”*

*“When you are clearer on what you want personally, it becomes easier to make better decisions about how the business should be built. As the business becomes stronger and less dependent on you, it can create more financial options. And when those options increase, the pressure on you personally comes down, which helps the business keep improving.”*

*“The next step is not for me to jump straight into planning recommendations. The score gives us the snapshot. Now we can use it to decide what is worth exploring next in the right order.”*

### How to Handle “No” Answers

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Every “No” answer is a signal.

Not a failure.

Not a diagnosis.

Not an immediate planning recommendation.

A signal.

Use the “No” answers to help the owner see where the next layer of work may begin.

### Simple Language

*“Rather than trying to solve everything right now, I’d look at the ‘No’ answers as signals. Which one or two feel most important based on what you want the business to make possible over the next 90 days?”*

Then ask:

*“Which of these feel like business issues? Which feel personal? Which feel financial? And which ones probably require help from your professional advisor team?”*

Do not rush into solving.

Let the owner see the pattern.

### If the Score Shows Strong Alignment

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Not every score will reveal obvious urgency.

That is okay.

### Simple Language

*“This is useful because it shows where things may already be working. The question is whether that alignment is durable. Is the business truly designed to keep supporting what you want, or is it still dependent on you holding everything together?”*

Then ask:

*“Which area feels most fragile right now — your time, your team, your wealth concentration, your role in the business, or your future options?”*

## If the Score Shows Gaps

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Use the lowest category to ask one better question.

### Personal Freedom Gap

*“This suggests there may be some disconnect between what you want personally and how the business is currently operating. What do you want the business to make possible over the next three to five years that it is not fully supporting today?”*

### Business Freedom Gap

*“This suggests the business may still be carrying too much through you personally. Where does the business still depend on you in a way that limits growth, value, or your ability to step back?”*

### Financial Freedom Gap

*“This suggests there may be pressure around how much of your future depends on the business. Where does financial pressure still affect the way you make business decisions?”*

## What Not to Do

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Keep these guardrails simple.

Do not explain the full OptionBuilt™ ecosystem too early.

Do not lead with the book or cohort before the score creates context.

Do not turn the score into a diagnosis.

Do not treat every “No” as a problem you need to solve.

Do not turn the score into a planning pitch.

Do not overstep your professional lane.

Do not make the owner feel like the score was bait for a sales conversation.

## Advisor Prep Checklist

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Before inviting an owner into the Personal Freedom Score™, answer these questions privately:

### 1. Why is this owner a fit for the score right now?

Notes:

### 2. What business result does this owner already care about?

Examples: growth, cash flow, leadership, margin, enterprise value, reduced dependency, succession, optionality.

Notes:

### **3. What planning conversation has already happened or should happen soon?**

Examples: tax, estate, wealth, insurance, liquidity, succession, exit, risk, diversification, advisor coordination.

Notes:

### **4. How can I avoid turning the score into a planning pitch too early?**

Notes:

## **Key Reminder**

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The Personal Freedom Score™ is the front door.

Do not overcomplicate it.

Do not over-explain it.

Do not use it to diagnose everything.

Do not turn it into a planning pitch.

Use it to create context, start a better conversation, and help the owner see the connection between what they want, what the business needs to become, and how planning can support the outcomes they already care about.

Once the owner sees that connection, the next step becomes much easier.