

Built 2 Own Workbook

REAL HOPE. REAL BUSINESS. REAL OWNERSHIP. *A Built2Own Workbook*

Welcome Letter

Welcome to a journey built not just for achievement—but for alignment. This workbook is your hands-on companion to the Built2Own system: where lifestyle transformation meets strategic business ownership. Whether you’re here to reclaim time, buy a business, or create legacy, each section is designed to move you from idea to ownership with clarity and confidence.

Let's get started.

SECTION ONE: FOUNDATIONS OF OWNERSHIP

Reflect: Where Are You Now?

Before we dive into strategies, let's get clear on where you're starting from. Take a moment to reflect honestly—this isn't about judgment; it's about clarity.

Current Ownership Scorecard Rate yourself (1-10) in the following areas:

- **Time Ownership: How well do you control your daily schedule and commitments?**
- **Financial Ownership: Are you clear on your income streams and confident in your spending?**
- **Energy Ownership: Are you investing your energy where it matters most?**
- **Vision Ownership: Do you have a clear, written vision for your ideal life or business?**

Use the space below to jot insights, patterns, or gut reactions that surface.

Vision Snapshot: Your Life & Business on Purpose

Prompt 1: Imagine Your Ideal Day Describe a typical day in your life 12 months from now if everything you're building comes true. Where are you waking up? What are you working on? Who are you with? How do you feel?

Leave space for reflection—use bullet points or storytelling style.

Prompt 2: What Do You Own? List the specific assets, businesses, habits, and freedoms that represent true ownership to you. Think financially, emotionally, spiritually, and practically.

The Ownership Gap

Before you step into new levels of ownership, it helps to know what's been holding you back. This exercise gets honest about friction—so you can face it and move through it.

Prompt 1: What Are You Currently Tolerating? List 5 things in your business, schedule, finances, or lifestyle that you're putting up with even though they're draining or misaligned.

Prompt 2: Where Are You Playing Small? Be real with yourself: What have you been avoiding, delaying, or talking yourself out of? What would it look like to show up fully?

Breakthrough Belief (Optional): Write a new belief or mantra that could help you shift from stuck to ownership.

The Built2Own Lens: Redefining Ownership

It's not just about money or assets. It's about who you become in the process. This page sets the tone for the mindset shift that fuels everything else.

Prompt 1: What Does Ownership Mean to You—Now? In a few sentences or bullet points, define what “ownership” meant to you 5 years ago... and what it means today.

Prompt 2: Built to Own vs. Built to Rent Jot a few contrasts between a “*Built to Own*” mindset and a “*Built to Rent*” one. (Think: habits, systems, goals, and even how you show up.)

Prompt 3 (Optional): Legacy Questions Who are you doing this for? What will be different for them because of the way you chose to own your life?

The Built2Own Framework: From Discovery to Ownership

This is the roadmap that links lifestyle, mindset, and strategic action. You'll return to these five phases again and again as your path unfolds.

- 1. Discover: Clarify who you are, what you want, and what you're no longer willing to settle for.**
- 2. Align: Match your energy, time, and resources to the vision that truly matters—professionally and personally.**
- 3. Acquire: Understand how to identify, evaluate, and purchase a business with confidence and clarity.**
- 4. Systemize: Implement tools, teams, and automation to reclaim your time and maximize your value.**
- 5. Elevate: Use your ownership to impact others, build legacy, and live with purpose beyond profit.**

Discovery Audit: Clarifying What Matters

This section helps you get radically clear on your current resources and motivators so that the path ahead is built on truth, not guesswork.

Prompt 1: Inventory Your Assets List your current skills, relationships, certifications, capital, and experiences that could be leveraged in a business or lifestyle shift.

Prompt 2: Core Motivators What's driving you right now? (Examples: freedom, impact, legacy, stability, faith, family, reinvention.)

Prompt 3: Roadblocks or Resistance Identify the fears, doubts, or practical limitations you think could slow you down. Naming them reduces their power.

ALIGN: Designing Life & Business on Purpose

Now that you've clarified what matters, it's time to align your daily actions, investments, and mindset with your bigger vision. This page sets the stage for intentional living.

Prompt 1: What Are You No Longer Willing to Sacrifice? Identify the non-negotiables moving forward—your health, family time, freedom, peace, faith, or creative space.

Prompt 2: Energy Audit List what activities give you energy—and what drains it. This helps you spot alignment gaps in your current routine.

Prompt 3: The “Yes” List What are the key things you'll say yes to in the next 90 days that align with your Built2Own vision? (Examples: learning a new skill, starting due diligence, clearing space on your calendar.)

Business as a Vehicle, Not the Destination

In the Built2Own philosophy, business isn't the goal—it's the engine. Ownership serves your lifestyle, not the other way around. Let's get realigned.

Prompt 1: Why Business Ownership? Write out the deeper “*why*” behind acquiring a business. What's the change you're trying to create—for yourself, your family, or your legacy?

Prompt 2: Define Success on Your Terms What does success actually look like for *you*? Be specific—think beyond revenue to freedom, relationships, impact, faith, and joy.

Prompt 3 (Optional): Is This Aligned? Reflect: Does the type of business you're pursuing support the life you want? If not, what adjustments are needed?

ACQUIRE: Finding the Right Business for You

Now we start building tactical momentum. But remember—this is not just about buying any business. It's about acquiring a business that fits your lifestyle, values, and vision.

Prompt 1: Your Acquisition Criteria List your must-haves, nice-to-haves, and deal breakers. Consider things like industry, location, profit margin, time commitment, customer base, or owner involvement.

Prompt 2: Strategic Fit Check Does this business support your “Built to Own” lifestyle? How will it impact your time, values, energy, and relationships?

Prompt 3 (Optional): Where Will You Look? Brainstorm 2–3 channels you’ll use to find deal flow (examples: local brokers, online marketplaces, Craigslist, direct outreach).

Deal Flow Tracker

This page helps you track opportunities in real time so nothing falls through the cracks. It turns your business search into a system—not a scramble.

Date Source Business Name Initial Notes Next Step Follow-Up Date

Tip: Use this table weekly to maintain momentum. Add columns or color-code if needed.

Reflection Prompt: What patterns are you noticing in your deal flow? Are certain types of businesses showing up repeatedly? Is one source stronger than others?

First Pass Deal Filter

Before you dive deep into due diligence, use this simple triage filter to evaluate whether a business is worth your time.

Does It Meet Your Core Criteria? Industry you understand or want to learn Location fits your vision or remote-friendly Owner involvement matches your time goals Profit margin or potential feels viable Lifestyle alignment (won't drain your energy or values)

Gut Check Prompt: What's your immediate reaction to this deal—excitement, confusion, resistance, curiosity? Trust the signal.

Optional Filter: Does this business serve *who you were, who you are, or who you're becoming?*

Quick Deal Snapshot

This page helps you distill the essentials of a potential deal onto one clean sheet. Great for comparing options side by side.

Business Name: Listing Price: Revenue (Annual): Profit (SDE or EBITDA): Asking Multiple (Price ÷ Profit): Years in Operation: Reason for Sale: Owner Involvement (Hours/Week): Employees or Contractors: Key Assets Included: Customer Concentration: Growth Opportunities: Red Flags or Concerns:

Use this page for every serious opportunity—keep copies in a separate file for tracking.

Due Diligence Builder: Start With What You Know

You don't need to be a CPA or M&A attorney to get started—you just need a sharp eye and honest questions. This page helps you build a custom due diligence checklist tailored to your acquisition style.

Step 1: Financial Clarity 2–3 years of tax returns Profit & Loss statements Balance sheet Bank statements Inventory & asset list Accounts receivable/payable details

Step 2: Operational Insights Owner's role and transition plan Key employee list and responsibilities Supplier and vendor contracts Sales process or marketing systems Customer retention or churn data

Step 3: Lifestyle Impact Weekly owner time commitment Seasonality or workload spikes Off-hours demands or emergencies Systems in place (or not in place)

Your Custom Add-On Questions:

Cash Flow Reality Check

Understanding the real-life cash flow of a business is key to knowing what you're walking into—and what you'll be able to walk away with.

Prompt 1: Monthly Cash Flow Snapshot Start sketching out a simple monthly cash flow estimate:

- Revenue: _____
- Fixed Expenses (rent, payroll, utilities): _____
- Variable Expenses (supplies, marketing, etc.): _____
- Owner Compensation (now or future): _____
- Net Profit (realistic): _____

Prompt 2: Lifestyle Viability Given the above, can this business support your financial goals or obligations? If not yet, could it—through cost cuts, growth, or strategic changes?

Optional Prompt: Personal Cash Flow Map Sketch your household or personal monthly budget next to this one. How does it line up? Where's the gap?

Systemize to Scale: Reclaim Your Time

Now that you've found (or are close to finding) the right business, it's time to design it to serve you—not trap you. This is where systems and delegation begin.

Prompt 1: What Tasks Can Be Delegated or Automated? List everything you (or the current owner) do that could be handed off, systemized, or simplified.

Prompt 2: Roles vs. People Don't hire for who you like—build roles for what the business needs. Write the top 3 roles your business needs filled (now or soon).

Prompt 3 (Optional): Systems Check What tools, software, or systems are already in place? What's missing that could make operations smoother?

ELEVATE: Impact Beyond Ownership

Now that you've acquired, aligned, and systemized—it's time to elevate. This phase is about purpose, generosity, and legacy. Ownership becomes a platform, not just a paycheck.

Prompt 1: What Impact Do You Want to Make? List 2–3 ways you want your business or ownership journey to positively affect others. (Think: family, employees, customers, community, or faith-based missions.)

Prompt 2: How Will You Give Back or Pay It Forward? Ideas: mentorship, tithing, hiring second-chance employees, building community programs, teaching others the Built2Own path.

Prompt 3 (Optional): Write a Vision Statement Craft a short, powerful vision for your elevated life—one sentence that captures what this was all for.

Own the Process: Weekly Momentum Map

Sustainable ownership isn't about big wins—it's about consistent movement. This page helps you stay grounded, focused, and intentional every week.

Weekly Focus (Big 3 Goals):

- 1.
- 2.
- 3.

What's One Thing I Can Let Go Of This Week? (Think: distraction, fear, task, habit, or responsibility that no longer serves.)

Who Can Help? Name one person you can ask for input, accountability, or support this week. (Team, mentor, family, faith community...)

Wins to Celebrate: List 1–2 small or big victories—even if they're just a mindset shift.

Celebrate the Shift: From Hustle to Ownership

Before we close out, this page is a moment to breathe and honor the work you've done—not just tasks completed, but identity transformed.

Prompt 1: What Have You Gained? List 3–5 things you've developed or reclaimed through this journey. (Could be clarity, courage, tools, direction, peace, time, purpose.)

Prompt 2: How Are You Showing Up Differently? Reflect on how your mindset, decisions, or habits have changed since you began the Built2Own process.

Prompt 3 (Optional): Pass It On Is there someone in your life who could benefit from this workbook or path? Jot their name or write a note to encourage them.

Your Built2Own Commitment

Ownership is a decision you make daily. This page helps you formalize that decision in a way that's both personal and powerful.

Commitment Statement: *Write a short declaration of what you're choosing to own from this day forward—your time, your business, your impact, your mindset. Make it yours.*

> “From this day forward, I choose to own...” >

_____ >

_____ >

Signature: _____ **Date:** _____

Built2Own Integration Page

Come back here after 30, 60, or 90 days to reflect, re-align, and re-ignite momentum.

Where Am I Now? What progress have I made since I started this workbook? What's shifted in my mindset, my schedule, or my clarity?

What Needs Attention? Where am I stuck, drifting, or avoiding ownership? What would help unlock the next step?

Next 3 Bold Moves: List three intentional actions to move forward with alignment and ownership in the next 30 days.

- 1.
- 2.
- 3.

This page is like a built-in checkpoint—perfect for a follow-up session, peer review, or just checking in with yourself.

Thank You for Choosing Ownership

You've just completed something powerful—not just a workbook, but a bold decision to reclaim your life, your time, and your future. That deserves to be honored.

Whether this is your first step or your fiftieth, thank you for letting Built2Own be part of your journey. May this be the foundation of lasting freedom, impact, and joy.

Next Steps:

- **Review your notes weekly**
- **Revisit the Weekly Momentum Map (Page 18)**
- **Share your story—someone needs your example**
- **Stay connected through *Deal-Flow Intel* for tools, leads & inspiration**
- **If you're ready for support, mentorship, or community—reach out**

In Ownership and Impact, *The Built2Own Team*