



Family Business Growth Workbook

Building a Business That Operates Without You

Prepared for:

www.leokhoury.me

Welcome

From Knowledge to Implementation

Welcome to your Family Business Growth Workbook.

As we begin this journey, I want to highlight a critical distinction: There is a massive difference between **knowing what to do** and **implementing what you know needs to get done**.

Too many family business leaders have the knowledge but lack the execution structure. They get stuck in the "technician" trap, working *in* the business rather than *on* it.

This workbook is not just a collection of forms. It is our shared roadmap.

Your Accountability Partner

You don't have to do this alone. In fact, you shouldn't.

That is why we will work together on a monthly basis. I will serve as your executive coach and accountability partner to ensure the strategies we map out here actually get implemented in the real world.

Schedule Your Monthly Coaching Session

or visit <https://calendly.com/leo-spartansc/clarity-call>

How to Use This Workbook

This document is designed to be a living tool for our coaching engagement. We will revisit these pages continuously as your business evolves.

The Collaborative Process

- ☐ **We Complete It Together:** While you will have your own copy, we will fill out key sections during our sessions to ensure clarity.
- ☐ **Monthly Accountability:** At the end of every major section, you will find an "Accountability Check-In." We will sign and date these as milestones are achieved.
- ☐ **Focus on Action:** Every page is designed to drive specific actions, not just theory.
- ☐ **Living Document:** Print this out. Write in the margins. It should get messy. A pristine workbook is an unused workbook.

The CASTLE Model

Our framework for growth and succession is built on six pillars.

C

Control

Mastering the business model, financials, and time.

A

Aspirations

Defining clear vision, goals, and alignment.

S

Strategy

Competitive positioning and market dominance.

T

Tactics

Operations, processes, and execution excellence.

L

Leverage

Systems, team structure, and delegation.

E

Evolution

Succession planning and eventual exit.

Why This Matters

Most family businesses fail to transition successfully because they skip steps. They try to work on "Succession" (Evolution) before they have "Control" of the finances. We will build your CASTLE brick by brick.

Section 1: Initial Assessment

Before we build, we must understand the foundation.

Current State Analysis

What are your top 3 frustrations right now?

Goals

1 Year Goal:

3 Year Goal:

5 Year Goal:

Strengths & Weaknesses

Business Strengths	Business Weaknesses

Data Request Checklist

Please gather the following for our next review:

- ☐ Profit & Loss Statements (Last 3 Years)
- ☐ Balance Sheet (Current)
- ☐ Current Organizational Chart
- ☐ Any existing Operating Manuals
- ☐ List of Key Employees & Roles

CASTLE Scorecard

Rate your business 1-5 (5 being Excellent/Fully Systematized)

Area	Score (1-5)
Control (Financials & Time)	<input type="text"/>
Aspirations (Vision & Alignment)	<input type="text"/>
Strategy (Market Position)	<input type="text"/>
Tactics (Operations)	<input type="text"/>
Leverage (People & Systems)	<input type="text"/>
Evolution (Exit Readiness)	<input type="text"/>

COACH ACCOUNTABILITY CHECK-IN

We have reviewed the Initial Assessment and agree on the baseline data for the engagement.

COACH SIGNATURE (LEO KHOURY)

DATE

Section 2: Control

Mastering your business model, financials, and time.

Revenue Model Calculator

Metric	Current Value	Target Value
Number of Leads (Suspects)	<input type="text"/>	<input type="text"/>
Conversion Rate (%)	<input type="text"/>	<input type="text"/>
= New Customers	<input type="text"/>	<input type="text"/>
Avg Transaction Value	<input type="text"/>	<input type="text"/>
Transactions per Year	<input type="text"/>	<input type="text"/>
= Total Revenue	<input type="text"/>	<input type="text"/>

Breakeven Analysis

Fixed Costs per Month:

Average Gross Margin (%):

Monthly Breakeven Revenue (Fixed Costs / Margin %):

Time Control

The owner must move from "Technician" to "Executive".

Time Study Log (Summary)

Estimate your % of time spent in these modes:

Role	Current %	Goal % (90 Days)
Technician (Doing the work)	<div></div>	<div></div>
Manager (Overseeing others)	<div></div>	<div></div>
Executive (Strategic growth)	<div></div>	<div></div>

COACH ACCOUNTABILITY CHECK-IN

Financial baseline established and Time Allocation goals set. Client understands Breakeven point.

COACH SIGNATURE (LEO KHOURY)

DATE

Section 3: Aspirations

Vision, goals, and alignment.

Personal Vision

Why are you in this business? What does it need to provide for you?

Business Vision

Describe the business as if you are seeing it 5 years from today (Size, Culture, Market):

Success Metrics

How will we know we are succeeding? (e.g., Net Profit, Hours Worked, Customer Satisfaction)

COACH ACCOUNTABILITY CHECK-IN

Vision is clear and documented. Goals are aligned with personal aspirations.

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DATE

Section 4: Strategy

Competitive positioning and market dominance.

Target Market

Who is your Ideal Customer? Be specific (Demographics, Psychographics).

Unique Value Proposition (UVP)

Why should they buy from YOU instead of the competition?

Competitive Analysis

Factor	Your Business	Competitor A	Competitor B
Price Point	<div></div>	<div></div>	<div></div>
Quality/Speed	<div></div>	<div></div>	<div></div>
Unique Strength	<div></div>	<div></div>	<div></div>

COACH ACCOUNTABILITY CHECK-IN

Market position is defined. We have identified a clear competitive advantage.

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Section 5: Tactics

Operations, processes, and execution excellence.

Core Processes

List the 5 major processes that drive your business (e.g., Sales, Fulfillment, Billing).

☐ 1.

☐ 2.

☐ 3.

☐ 4.

☐ 5.

Standard Operating Procedures (SOPs)

Status of documentation:

Process Name	Documented? (Yes/No)	Assigned To
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Technology Plan

What tools/software do we need to implement to automate these?

COACH ACCOUNTABILITY CHECK-IN

Key processes identified. Roadmap for SOP creation is established.

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Section 6: Leverage

Systems, team structure, and delegation.

Organizational Chart

Current Gaps (Roles needed immediately):

Employee Assessment

Rate key team members (1-10) on Performance vs. Values.

Name	Role	Performance Rating	Values Rating
<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>
<div></div>	<div></div>	<div></div>	<div></div>

Delegation Plan

What tasks are you currently doing that you must delegate in the next 30 days?

COACH ACCOUNTABILITY CHECK-IN

Team assessment complete. Delegation plan agreed upon.

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Section 7: Evolution

Succession planning and eventual exit.

Exit Timeline

Target Exit / Succession Date:

Succession Readiness

- ☐ Potential Successor Identified
- ☐ Successor Training Plan in Place
- ☐ Retirement Income Needs Calculated
- ☐ Business Valuation Estimate Completed

Milestone Mapping

What needs to happen 1 year before exit?

What needs to happen 3 years before exit?

COACH ACCOUNTABILITY CHECK-IN

Long-term exit strategy discussed and rough timeline established.

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DATE

Section 8: Marketing Foundation

Fueling the growth engine.

Elevator Pitch

Describe your business in one compelling sentence:

Tactics Checklist

- ☐ Website Optimized
- ☐ Google Business Profile Updated
- ☐ Email Newsletter System
- ☐ Referral Program Defined
- ☐ Social Media Strategy (LinkedIn/FB)
- ☐ Client Testimonial Collection Process

Budget

Channel	Monthly Budget
Digital Ads	<div></div>
Content/SEO	<div></div>
Events/Networking	<div></div>

COACH ACCOUNTABILITY CHECK-IN

Marketing foundation reviewed.

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DATE

90-Day Action Plan

Turning insight into immediate action.

Top 5 Priorities

1.	
2.	
3.	
4.	
5.	

Coaching Schedule

We will meet on the following dates to review progress:

Month 1	
Month 2	
Month 3	

FINAL COMMITMENT

I commit to executing this plan over the next 90 days with the support of my coach.

CLIENT SIGNATURE

DATE





Let's Turn Knowledge Into Action

"You now have the roadmap. But a roadmap without a driver is just paper. Let's build a business that serves your life, rather than one that consumes it."

Leo Khoury

Family Business Advisor & Executive Coach

www.leokhoury.me

Book Your Next Session

