CWI
OTP ASSESSMENT™

THE OWNER TRANSITION PROFILE™ ASSESSMENT lets you uncover the hidden psychological factors impacting a business owner's behaviors related to significant transitions - scaling, selling, or family succession.

DISCOVER THE COMPLEX DRAMA *PLAYING OUT IN THE BUSINESS OWNER'S INNER WORLD - AND HOW TO GET AHEAD OF IT.*

WHAT IT MEASURES

ROLE IDENTITY FUSION

The self-identity and an owner's role identity can become inseparable. Discover what 'letting go' of their role will really mean for the owner.

APPROACH TO CHANGE

Get below the surface to understand your client's problem-solving style in times of change and how it might help or hinder transition efforts.

COMMUNICATION STYLE

Decrease resistance through an informed communication approach that identifies what an owner needs to hear and how they need to hear it.

DESIGNED TO HELP ADVISORS HELP OWNERS

These three constructs give you the profile of an owner's inner world and how they will experience a significant transition. You'll find out how attached they are to their business, how they handle change, and how to best approach their communication needs. Those insights allow you to help owners gain greater clarity and the confidence needed for achieving their transition with less stress for all involved.

$290 PER REPORT

WHAT'S INCLUDED

- OTP Assessment
- 90-minute training for advisors
- Free consultative support (15 min)
- Insights that get client results

UNCOVERING THE HUMAN SIDE OF BUSINESS TRANSITIONS

Clear Water Insights' business transition tools help advisors guide clients through the business and human aspects of critical transitions - be it scale, sale, or succession. Part diagnostic, part roadmap - these tools help advisors assess transition capacity on multiple levels. Take the guesswork out of guiding clients and deliver more satisfying transition outcomes.

DISCOVER THE SCIENCE AROUND TRANSITION READINESS

The biggest risks to transition are the unseen human aspects of the people involved - identity needs, fears, doubts, family relationships, hopes, dreams, and emotional ties. Our transition tools and training give you actionable insights and common language to talk through these issues with clarity and confidence. Learn how to work with the owner's need for control rather than building resistance.

PROVEN

Clear Water Insights' transition tools are scientific, proven, and delivered with expertise.

INTEGRATED

Our assessments target not just the business aspects of transition, but the complex human realities as well.

ACTIONABLE

Assessment results are immediately applicable, allowing advisors to give clients practical next steps.

HOW OUR ASSESSMENTS WORK

CWI Assessments are intended to be administered by an advisor and include the required training to ensure responsible interpretation of results.

WHAT YOU CAN EXPECT

When you first gain access to an assessment, you will be required to complete a short, 90-minute training. From there you can administer the assessment, receive, and interpret client results.

WHAT YOUR CLIENTS CAN EXPECT

Our assessments are designed with owners in mind, taking no longer than 15 minutes to complete. Owners use an advisor-provided link, answer the multiple-choice questions and get their own summary report.