CWI
OTP ASSESSMENT™

THE OWNER TRANSITION PROFILE™ ASSESSMENT lets you uncover the hidden psychological factors that can affect your thoughts, behavior, and decision-making during times of significant transition (scaling, selling, or family succession).

DISCOVER YOUR PERSONAL LEVEL *OF READINESS FOR TRANSITIONING YOUR BUSINESS - AND WHAT STEPS YOU CAN TAKE TO MAKE IT SUCCESSFUL.*

WHAT IT MEASURES

ROLE IDENTITY FUSION

Your self-identity and role identity can become inseparable. Gain insights for increasing your ability to achieve a successful transition with less stress.

APPROACH TO CHANGE

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

COMMUNICATION STYLE

Get a candid look into how you communicate and what it means for the approach your advisor will take as you both work to achieve your goals.

DESIGNED TO HELP YOUR ADVISORS HELP YOU

These three constructs give you and your advisor critical insights for working together to achieve your goals. Your advisor will have the information needed to design a process that works for you! You will gain greater confidence and clarity for decision-making leading to more control over your own transition.

THE PROCESS

- Your advisor will take a 90-minute training
- Your advisor will administer the Owner Transition Profile to you.
- You'll both receive results that help your advisor meet your needs more effectively.

UNCOVERING THE HUMAN SIDE OF BUSINESS TRANSITIONS

Clear Water Insight's business transition tools help you and your advisor reduce complexity as you navigate the human aspects of critical transitions - be it scale, sale, or succession. Part diagnostic, part roadmap - these tools empower you to leverage your own psychology rather than have it work against you. The same tool gives advisors critical insights for guiding you through a successful transition journey.

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 and your advisor actionable insights and common language to talk through these issues with clarity and confidence.

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, giving you 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 YOUR ADVISOR DOES

When your advisor first gains access to an assessment, they will be required to complete a short, 90-minute training. From there they'll administer the assessment to you. Then, they will receive, and interpret your results.

WHAT YOU CAN EXPECT

Our assessments are designed with you (and your schedule) in mind, taking no longer than 15 minutes to complete. You will use an advisor-provided link to answer the multiple-choice questions. Then you will receive personalized results from your advisor.

CLEAR WATER INSIGHTS™

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