

LEGACY 83 BUSINESS

Build Wealth. Inspire Teams. Leave a Legacy.

PREPARED FOR
Icy Williams, Founder & CEO

DATE
December 29, 2025

DOCUMENT TYPE
Strategic Action Brief

EXECUTIVE SUMMARY

Legacy 83 Business is strategically positioned to capture significant market share in the \$20 billion U.S. business coaching industry. Your unique approach—combining growth acceleration with succession planning—addresses a critical gap that established competitors overlook.

Market Opportunity: 12 million U.S. businesses are owned by individuals aged 50+ with no succession plan. As 10,000 Baby Boomers reach retirement age daily, demand for legacy-focused business coaching has never been higher.

FINANCIAL PROJECTIONS

\$360K
Year 1 ARR Target

\$30K
Monthly Revenue (Month 6)

\$45K
Customer Lifetime Value

45
Qualified Prospects Ready

YOUR COMPETITIVE ADVANTAGE

While ActionCOACH focuses on franchise systems and EOS emphasizes operations, Legacy 83 uniquely addresses the fundamental question keeping business owners awake: *"What happens to everything I've built?"*

The G.R.O.W.S. Framework Differentiators:

- **Dual Focus:** Immediate results (90-day promise) + long-term legacy building
- **Succession Integration:** Every growth strategy includes transition planning
- **Founder-Led Access:** Direct coaching from Icy Williams, not junior associates
- **Legacy Growth IQ™:** Proprietary assessment tool providing immediate value
- **Accessible Pricing:** Premium value without enterprise-level pricing

TARGET MARKET PROFILE

Ideal Client Characteristics:

- Annual Revenue: \$500K - \$10M
- Employees: 5-50
- Owner Age: 40-65
- Business Age: 3-20 years
- Working IN the business, not ON it
- Concerned about succession and exit strategy
- Values family and legacy over pure profit maximization

High-Value Industries:

- Professional Services (accounting, legal, consulting, marketing)
- Healthcare Practices (dental, medical, therapy, veterinary)
- Construction & Trades
- Small Manufacturing (job shops, custom manufacturers)
- Multi-generational Family Businesses

IMMEDIATE ACTION PLAN

Phase 1: Weeks 1-2 (Tier 1 Activation)

TIER 1 PROSPECTS (15 Companies) - Immediate Outreach

Profile: Owners 50+, clear succession needs, 20+ employees

Crosley & Associates CPA (Cincinnati)

28 employees | \$4.5M revenue | Partner succession challenges

Tri-State Builders Inc.

55 employees | \$12M revenue | Owner late 50s, no successor

Precision Metal Works

65 employees | \$14M revenue | 2nd generation considering exit

Great Lakes Manufacturing (Cleveland)

85 employees | \$18M revenue | Owner approaching 60, no family successor

Action Items:

- Send personalized emails highlighting succession planning expertise
- Phone follow-up within 48 hours
- LinkedIn connection requests with custom message
- Invite to complete Legacy Growth IQ™ Quiz

Phase 2: Weeks 3-4 (Tier 2 Engagement)

TIER 2 PROSPECTS (15 Companies) - Follow-up Outreach

Profile: Growing companies, 15-40 employees, leadership development needs

Queen City Marketing Group (Cincinnati)

35 employees | Scaling operations challenges

Cincinnati Physical Therapy Partners

38 employees | Therapist retention & expansion

Tristate IT Solutions

32 employees | Growth & talent retention

Action Items:

- Launch email campaign focused on leadership development
- Share relevant case studies
- Webinar invitation: "Building a Leadership Team That Runs Without You"

Phase 3: Ongoing (Tier 3 Nurture)

TIER 3 PROSPECTS (15 Companies) - Long-term Nurture

Profile: Smaller companies, 10-25 employees, longer sales cycles

Northside Veterinary Hospital

20 employees | Work-life balance & succession

Cincinnati Plumbing & HVAC

18 employees | Growth management

Action Items:

- Monthly newsletter subscription
- Quarterly check-in emails
- Educational content delivery

MARKETING STRATEGY

Core Message: The "Legacy Gap"

Most business owners build successful companies but have no plan for what happens next. Legacy 83 bridges this gap through the 4 L's of Legacy:

- **Leadership:** Develop leaders who can run the business independently
- **Leverage:** Create systems that scale beyond personal capacity
- **Longevity:** Build a business that outlasts any individual
- **Legacy:** Create impact that extends beyond profit

Multi-Channel Campaign:

- **Content Marketing:** The Legacy Journal blog featuring "5 Signs Your Business Would Collapse Without You" and "The Succession Planning Checklist Every Owner Needs"
- **LinkedIn Strategy:** Thought leadership positioning, weekly posts, engagement with target prospects
- **Email Marketing:** Legacy Growth IQ™ Quiz as lead magnet + 5-email nurture sequence

- **Local Networking:** Cincinnati USA Regional Chamber, SCORE, Family Business Center at Xavier University
- **Strategic Partnerships:** CPAs, business attorneys, financial advisors, business brokers

KEY PERFORMANCE TARGETS

Marketing Metrics (Month 6):

- 500 website visitors monthly
- 1,000 LinkedIn followers
- 500 email subscribers
- 50 Legacy Growth IQ™ Quiz completions monthly

Lead Generation (Month 6):

- 30 total leads monthly
- 15 qualified leads monthly
- Cost per lead under \$50

Sales Pipeline (Month 6):

- 15 discovery calls monthly
- 8 strategy sessions monthly
- 5 proposals sent monthly
- 4 deals closed monthly

FOUNDATION BUILDING PRIORITIES

Week 1-2 Critical Tasks:

- Set up CRM system (HubSpot or Salesforce)
- Import 45-prospect database
- Create email templates for all three tiers
- Optimize Legacy Growth IQ™ Quiz landing page
- Prepare sales collateral and case studies

Month 1 Partnership Development:

- Identify 5 target CPA firms for referral partnerships
- Connect with 3 business attorneys
- Join 2 local business organizations
- Schedule speaking opportunities (Chambers, SCORE)

DATABASE EXPANSION TIMELINE

- **Current:** 45 qualified prospects (Tier 1-3)
- **Months 2-3:** Add 25 companies = 70 total
- **Months 4-6:** Add 50 companies = 120 total
- **Months 7-12:** Add 100 companies = 220 total

Year 1 Target: 220 qualified prospects with systematic outreach and nurture programs

POSITIONING STATEMENT

"Legacy 83 is the only business coaching firm that combines strategic growth planning with succession readiness, helping small business owners build companies that thrive today and endure for generations—all with measurable results in 90 days."

NEXT STEPS - YOUR 30-DAY LAUNCH PLAN

This Week:

- Review and approve Tier 1 outreach messaging
- Select CRM platform and begin setup
- Schedule time blocks for prospect calls
- Finalize Legacy Growth IQ™ Quiz

Week 2:

- Launch Tier 1 outreach (15 prospects)
- Begin LinkedIn connection campaign
- Schedule first partnership meetings

Weeks 3-4:

- Tier 1 follow-up calls
- Launch Tier 2 email campaign
- Host first webinar or workshop
- Secure first partnership agreements

LEGACY 83 BUSINESS

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Confidential Strategic Brief | December 29, 2025