

# LEGACY 83 BUSINESS

*Build Wealth. Inspire Teams. Leave a Legacy.*

PREPARED FOR

Icy Williams, Founder & CEO

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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

## SERVICE PORTFOLIO

Legacy 83 delivers value through four core service offerings designed to address the complete business lifecycle:

- **Strategic Planning:** Vision-aligned roadmaps connecting daily decisions to long-term legacy goals, including business vision development, goal setting and tracking, strategic roadmapping, and performance metrics

- **Leadership Coaching:** Transform leadership skills to empower teams through executive coaching, team leadership development, communication skills enhancement, and conflict resolution
- **Operational Excellence:** Streamline systems to reclaim time and improve margins via process optimization, system implementation, efficiency analysis, and cost reduction strategies
- **Legacy Transition:** Succession planning, business valuation, exit strategy development, and knowledge transfer—ensuring owners can step away confidently

## PLATFORM CAPABILITIES

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The Legacy 83 digital platform extends service delivery through integrated technology solutions:

### **GoHighLevel (GHL) Marketing & CRM Integration**

- Automated lead capture from Legacy Growth IQ™ Quiz
- Multi-channel follow-up sequences (email, SMS, voicemail drops)
- Pipeline management with stage-based automation
- Appointment scheduling with calendar sync
- Reputation management and review collection
- Comprehensive analytics dashboards tracking lead-to-client conversion

### **Proposal Creation System**

- Templated proposal frameworks aligned with G.R.O.W.S. methodology
- Dynamic pricing calculators based on engagement scope
- Digital signature integration for faster close rates
- Proposal tracking with open/view analytics
- Automated follow-up sequences for pending proposals

### **Learning Management System (LMS)**

Comprehensive educational platform powering client development programs:

- **Course Tracking:** Progress monitoring with completion certificates and milestone recognition
- **Subscription Management:** Tiered membership levels (Legacy Starter, Legacy Builder, Legacy Master) with automated billing
- **Pre/Post Assessments:** Diagnostic assessments and outcome measurements to demonstrate ROI
- **Workshops:** Live and recorded sessions with registration management and resource distribution

- **Online Training:** Self-paced video modules, downloadable workbooks, and interactive exercises
- **Performance Tracking:** Individual and cohort analytics measuring skill development and business outcomes

**Content Hub:** The Legacy Journal blog serves as the content marketing engine with SEO-optimized articles, scheduled publishing, and lead magnet embedding to capture engaged readers.

## YOUR COMPETITIVE ADVANTAGE

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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
- **Technology-Enabled Delivery:** Integrated platform combining CRM, LMS, and proposal systems for seamless client experience

## TARGET MARKET PROFILE

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### 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**

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### **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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