CLARIFY YOUR DIRECTION

Bridge Readiness Review

Set aside 15-20 minutes. Keep the detail on your own device or paper. An evidence checklist to identify what you know, what is missing and which decisions need independent advice.

01 / The decision on the table

Describe the actual decision and when it needs review. Include alternatives such as staying employed, changing role, reducing scope, pausing or stopping.

02 / Protect the household

List the commitments a transition must support. Identify financial, benefits, tax, insurance or legal questions for qualified independent professionals. Do not enter account numbers.

03 / Customer evidence

What recent, dated evidence shows a real problem and willingness to engage? Distinguish compliments, conversations, purchase intent and actual paid delivery.

Reflection and planning only. No income guarantee or professional financial, legal or clinical advice.

TURN THE WORKSHEET INTO A SMALL NEXT STEP

Bridge Readiness Review

Use actual examples and dated evidence. An honest decision to pause or stop is a useful result.

04 / Delivery evidence

What has been delivered, by whom, with what time and costs? Which assumptions about capacity, pricing or operations remain untested?

05 / Gaps and a fallback

For each important unknown, name a low-commitment way to learn more. Write a fallback if results or circumstances change.

06 / A review with evidence

Choose a review date and participants. For each major claim, name the evidence source and date. Do not treat completing this worksheet as permission to resign or commit funds.

Want help turning this into a clearer next step?

Explore Transition Advisory and save a program-review request. Paid enrollment is not currently open.

Explore coaching and request a review

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