



# Owner's Intent Worksheet

*Use this to put words to what you're really building.*

## Step 1: Define What You Want

Get specific. Let go of what sounds impressive and focus on what feels right to you.

How big do I want this business to get?

Do I want to stay in the field—or eventually step out?

Do I want a lean, profitable operation or a larger team with growth potential?

Is this something I want to keep forever, sell, or pass on?

What do I value most: time, freedom, money, impact, or legacy?

## Step 2: Get Clear on What You Don't Want

Define your boundaries and what you AREN'T looking for. This can include statements like:

- I don't want to be on call every weekend.
- I don't want to work 12-hour days forever.
- I don't want to manage a big team.
- I don't want to grow just for the sake of growth.

What do you not want for your life as it related to this business?

## Step 3: Connect It to Your Life

Zoom out. Ask yourself:

What kind of life do I want this business to support?

What should my day-to-day actually look like?

How much time do I want with my family—or to myself?

What do I want the business to eventually make possible?

### Step 4: Write Your Statement

Now bring it all together in a short, clear statement. Use this structure if it helps:

I want to build a pool company that \_\_\_\_\_ so that I can \_\_\_\_\_.

I'm willing to \_\_\_\_\_ to make that happen, but I'm not willing to \_\_\_\_\_.

Or use one of these prompts to get started:

- I'm building this business so that...
- I want to grow to the point where...
- The business should allow me to...
- I never want to be stuck doing...
- When I succeed, I want to feel...

Write until it feels right. You'll know you've landed on it when it feels like a deep exhale—like something you've been trying to name finally clicked into place.

### Make It Useful

Once you've written it, keep it close. This is a working tool, not a forgotten file.

- Print it out. Post it in your office.
- Save it to your phone or computer.
- Review it monthly, or whenever you feel overwhelmed or off-track.
- Talk about it with your spouse, partner, or team.
- Use it to guide every big decision: hiring, pricing, service offerings, marketing, expansion.

When you're tempted to add something shiny or feel pulled in too many directions, your Owner's Intent brings you back to center.

### Don't Wait for Perfect

Your Owner's Intent isn't permanent. It's not a contract—it's a compass. It should evolve as you grow, learn, and change. What matters is that you have a version of it today, so you can start building with direction.

If you're waiting to "get through the busy season" or find the perfect words, you'll never write it. Don't aim for polished—aim for honest.