



P.R.E.P. Diagnostic Action Plan
Created for Claire Thomas, CEO and Founder of Umbrella Corp.
Prepared by P.R.E.P Expert, Birthing of Giants

Conversation Summary

Claire, CEO and Founder of Umbrella Corp. engaged with the Birthing of Giants P.R.E.P Expert to discuss her current business challenges and opportunities. Recently, her head of sales (right hand person) recently stepped down.

Claire shared that she's feeling stretched thin and weighed down by operational complexity, a result of institutional knowledge and key functions still being too reliant on her. This is a classic founder bottleneck and that the path forward involves extracting her knowledge, building systems around it, and delegating to a more specialized team structure.

There is a powerful potential of a custom framework and the early-stage "University," which could become the foundation for scalable intellectual property and a more thought-leadership-driven model. Claire stressed the importance of setting her sights on the "Owner's Box" so the business can grow without being dependent on her daily involvement.

Key Recommendations

- 1. Systematize and Document Founder IP:**
 - a. Extract Claire's knowledge from daily operations into documented, teachable systems. Use AI tools like Scribe.com to document these processes in real time.

- 2. Intellectual Property Development:**
 - a. Make new framework and related intellectual property central to brand, marketing, and product development. Claire should position herself as "The Visionary Whisperer" with the framework as her signature methodology — maybe turn this into a certification program.

- 3. Develop Revenue Diversification Models:**

- a. Explore and test new revenue streams, including training, certification, and content monetization.
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- 4. Strengthen Emotional Resilience:**
 - a. Reframe team turnover as part of growth, not personal failure; adopt a systems-over-people mindset.
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- 5. Invest in Exit-Readiness:**
 - a. Align all business systems, team functions, and strategic IP development with a 3–5 year exit or transition plan.
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Suggested Action Plan

- 1. Launch Formal Program for “University”**
 - a. Develop curriculum based on your documented methodologies
 - b. Create certification standards and ongoing education requirements
 - c. Build a community platform for certified integrators

 - 2. Implement Thought Leadership Strategy**
 - a. Fast-track your book publication
 - b. Develop a speaking platform around your core concepts
 - c. Create a podcast interviewing successful visionary/integrator pairs

 - 3. Design Your Exit or "Owner's Box" Strategy**
 - a. Envision your ideal 3-year outcome and stack one year strategies to make this a reality
 - b. Identify key capabilities and systems needed for that future
 - c. Create metrics to track progress toward reduced founder dependency
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Resources for further exploration and personal growth

Birthing of Giants Fellowship Program:

Claire should consider applying for the **Birthing of Giants Fellowship Program** because it offers the exact combination of strategic structure, peer collaboration, and expert mentorship she needs to evolve from being the operational nucleus of her business to becoming a true Visionary working solely on big picture and long term strategy.

The Fellowship Program is designed specifically for entrepreneurs at her stage—leaders with a strong foundation and compelling intellectual property, but who are still too central to the day-to-day functioning of the business. Key reasons why the Fellowship is a strategic fit for Claire:

- Dedicated space and framework to focus on “moonshot” ideas like her “University.”
- Access to a high-caliber cohort of founders tackling similarly complex transitions.
- Help Claire transition from a founder-led to a systems-driven business by providing strategic frameworks for team structure, delegation, and leadership development.

Here are the application steps:

1. Apply: birthingofgiants.com/fellowship-program/application
2. Interview: Have a 20-minute call with Lewis Schiff to discuss the details and outcomes of the program CEO-to-CEO

Books and Publications:

- *First Habit* by Lewis Schiff – Diving into your leadership style and strengths - download the free PDF here: birthingofgiants.com/first-habit
 - *Who Not How* by Dan Sullivan - For delegation and team building strategy
 - *Entrepreneurial You* by Dorie Clark - For diversifying revenue streams
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Appendix: Birthing of Giants Transformation Blueprint



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1. **P.R.E.P.:** The initial focus on your Value Proposition Transformation Plan starts with Profits, Revenues, Exit Prices
2. **THREE-LEGGED STOOL:** All business models originate from the same “High Performance, Cheap Labor” value proposition:
 - a. Labor - You Add Headcount So Your Clients Don’t
 - b. Technology - You Deploy Tech Faster Than Them
 - c. Cash - You Become Their Bank
3. **4 LEVERS:** All change in a company comes about from pulling these 4 Levers inside and outside your company
 - a. MONEY: Capital Market Transformation
 - b. MODEL: Financial Model Transformation
 - c. MARKET: Revenue Transformation
 - d. MANAGEMENT: Leadership Transformation
4. **#OYFT:** The strategic backbone of Birthing of Giants’ transformation blueprint is planning resources and goals 12 months into the future
5. **STRATEGY STACKING:** The way we move companies over 3-5 years is to stack “One Year From Today’s” on top of one another while benchmarking past progress
6. **OUTCOMES:** The SMALL GIANT, BIG GIANT, GIANT EXIT Outcomes are the essential goals we are seeking to achieve over 3-5 years through value proposition reinvention

Sample P.R.E.P. Action Plan – For Illustrative Purposes Only. All names, financials, and sensitive business information have been changed or anonymized to protect privacy and confidentiality. This document is not intended as personalized business advice.