DOCUMENT REGISTER

EDITION	2026
DOCUMENT	Executive overview
REFERENCE	CPI-XP
AUDIENCE	Owners, founders and boards

COMPASS PERFORMANCE INC

Exit Planning

A transferable enterprise, not a transaction

Increase transferability, reduce owner and founder dependence, strengthen the leadership and operating system — an enterprise that can transition, not a transaction dressed up.

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Architecture determines performance.

COMPASS PERFORMANCE INC

EXECUTIVE OVERVIEW · 2026

Steve Kopecky, Founder and Facilitator

224.307.0912 · skopecky@compassperformanceinc.com

500 West Silver Spring Drive, Suite K-200, Glendale, Wisconsin 53217

COMPASSPERFORMANCEINC.COM

WHAT THIS IS · WHO IT IS FOR · WHAT HAPPENS NEXT

01

Architecture, not a sale event.

What this is

Exit planning is the deliberate architecture of a more valuable, transferable enterprise. The work builds enterprise value, reduces owner dependency and creates options — whether or not a transaction ever happens.

Compass brings together valuation, investment, legal, tax and wealth specialists around the owner, and protects what makes the business distinctive while the operating system is strengthened. Succession is one component of the work, not the definition of it.

02

Who it is for

Owners and leaders considering an eventual transition — not only those with an imminent sale. The earlier the architecture work begins, the more options remain: internal succession, partial recapitalization, family transfer, sale, or simply an enterprise that no longer depends on one person.

03

The four readiness dimensions

OWNER READINESS	Goals, timing, identity, emotional readiness and life after ownership.
ENTERPRISE READINESS	Systems, operating discipline, owner independence and transferability.
FINANCIAL READINESS	Financial quality, cash flow, reporting, concentration and value drivers.
LEADERSHIP & SUCCESSION READINESS	Leadership depth, decision capability and a bench tested on real responsibility.

04

How the work moves

- Read readiness across all four dimensions, with evidence rather than assumption.
- Reduce founder dependence: transfer decisions, relationships, governance and knowledge into the organization.
- Develop and test successors through real P&L, strategic and organizational responsibility — decisions, not simulations.
- Confirm the internal successor, or move to external search only when the internal path genuinely closes.
- Strengthen the operating system so value is visible, durable and transferable.

WHERE THIS SITS IN THE COMPASS OPERATING FRAMEWORK

One architecture. This is one way into it.

FOUNDATION™ → SIMPLIFY™ → LEAD™ → GROW™, powered by ARC™. The work below is where this offering contributes.

FOUNDATION™	The candor and trust an ownership transition requires.
SIMPLIFY™	Concentration, complexity cost and the vital few value drivers.
LEAD™	Governance, cadence and decisions that no longer route through the owner.
GROW™	Leadership depth and the bench a transition depends on.
ARC™	Periodic re-reading of readiness as the enterprise and the timeline change.

THE NEXT STEP

Begin a conversation.

compassperformanceinc.com/exit-planning
compassperformanceinc.com/contact
Steve Kopecky, Founder · 224.307.0912