

The Legacy Readiness Audit

Powered by The Centered CEO

Inner Clarity for Strategic Impact

As a former CEO and Board Advisor, I leverage three decades of experience to guide leaders using the proprietary Clarity-to-Impact Model. This audit provides the five essential board-level questions required to ensure your organization's value outlives the current executive tenure.

Instructions: This audit is designed for confidential review by the CEO and Board. Score the organization's preparedness in these areas on a scale of 1 (High Risk / Non-Existent) to 5 (Sustainable / Fully Implemented).

1. The Legacy Readiness Audit

Score the organization's current state on a scale of 1 (High Risk) to 5 (Sustainable). Brief notes are required to justify the score.

Audit Question	Brief Description	Readiness Score (1-5)	Rationale/Evidence (Brief Notes)
1. Succession & Talent Depth	Measures the strength and immediate readiness of the internal leadership pipeline and bench strength.		
2. Cultural Autonomy	Assesses the degree to which the organisation's core purpose and values can survive a change in executive leadership.		
3. Purpose-Alignment Fidelity	Evaluates the alignment between stated mission, incentives and employee retention (a measure of P-A Churn)		
4. Constraint Enforcement	Gauges the current effectiveness of strategic discipline in resource allocation and complexity reduction (a measure of Simplification ROI)		
5. Integrity Tax Status	Reviews the organisation's vulnerability to cultural friction caused by tolerating low-integrity performance (a measure of the D-I Score)		



2. The Board's Core Questions (The Legacy Framework)

Use the following specific criteria to inform your scores in Section 1. Answer Yes/No for each criterion.

A. Succession & Talent Depth (L-R Grade)

Criteria	Yes/No
Mandate Check: IS the current leadership pipeline deep enough to replace the current CEO with two viable internal candidates tomorrow?	
CEO Dependency: Does the current strategic plan rely excessively on the charisma or specific talents of one person (a Single Point of Failure)?	

B. Cultural Autonomy

Criteria	Yes/No
Enduring Culture: if the current CEO/Founder retired tomorrow, is the cultural framework strong enough to withstand the transition?	
Founder Effect: Is the organisation's core purpose tied to repeatable processes, or is it solely dependent on the personality of the current leadership?	

C. Purpose-Alignment Fidelity (P-A Churn)

Criteria	Yes/No
Retention Check: IS the turnover rate of high-potential, purpose-driven talent within the target range (low P-A Churn)?	
Mission Check: Do leadership incentives explicitly tie compensation to cultural growth and talent retention, not just short-term output?	

D. Constraint Enforcement (S-ROI)

Criteria	Yes/No
Strategic Focus: Are we currently enforcing disciplined constraints (via the Strategic Stop List) to ensure resources are focused on the highest-impact priorities?	
Resource Efficiency: Are we visibly tracking and celebrating the budget and time redirected from low-impact projects to high-impact strategic targets?	

E. Integrity Tax Status (D-I Score)

Criteria	Yes/No
Zero Tolerance Check: Has the Board or CEO recently taken a visible action to address a high-performing leader who violated cultural integrity (a Toxic Achiever)?	
Ethical Check: Are we investing adequately in the long-term talent pipeline, or are we paying the Integrity Tax through short-term, low-integrity hires?	



3. Legacy Mandate (Action Plan)

CALCULATION MANDATE:

1. **Sum the Scores:** Add the five scores (1-5) from the **Legacy Readiness Audit** in Section 1 (Max 25).

2. **Calculate Average Readiness Score:** Divide the total sum by 5.

Use the **Average Readiness Score** to determine the immediate action required for sustainable growth:

Total Score Analysis	Mandate and Strategic Action
Average Score 4.0 or Above	Mandate: Sustain. Your organisation is well-designed. Focus on maintaining these disciplines and expanding the Legacy Framework.
Average Score 2.5-3.9	Mandate: Remediation. Immediate work is required on key areas (typically Talent Depth and Integrity). The organisation is currently vulnerable to short-term crisis.
Average Score Below 2.5	Mandate: Intervention. Your high-growth model is unsustainable. You lack the foundational framework to survive a major market disruption. Immediate intervention is required to install the Clarity-to-Impact Model.

4. The Legacy Risk Summary Matrix

Review all your "No" answers from Section 2. Place a checkmark next to every Legacy Risk category that received a "No."

Legacy Risk Category	Immediate Risk Check	Strategic Consequence (The Cost)
Talent/Succession Risk	(Check if No in Section 2A)	Single point of failure; high cost for external hiring; pipeline collapse.
Cultural Endurance Risk	(Check if No in Section 2B)	The organisation is too reliant on the founder/CEO's personality; values will fail upon transition.
Strategy and Execution Risk	(Check if No in Section 2D)	Resources are diluted; low Simplification ROI; vulnerable to external competition.
Alignment and Integrity Risk	(Check if No in Section 2C/2E)	High P-A Churn (talent leaves due to lack of purpose); paying the Integrity Tax through misaligned incentives.

Ready to Build a Sustainable Legacy?

If this Audit revealed a score that jeopardizes your long-term valuation, your organization is confusing growth for lasting value.

Initiate a **Confidential Strategic Discussion** to explore how the **Clarity-to-Impact Model** can install the disciplines required for **Lasting Enterprise Value** and an enduring legacy.