

Intake Questionnaire: Executive Retreat Filter

Purpose: This intake tool is designed to filter for execution-ready executives—individuals who have already completed their internal Source, Pressure, and Awareness work and are prepared for immediate strategic implementation.

Filter Logic: Each section maps directly to a specific stage of readiness. Assessment focuses on immediate activation potential rather than general capability. Vague, hedging, or heavily processing answers indicate the candidate is not yet execution-ready (route to referral partner). Sharp, highly specific, and decisive responses indicate a green light for the retreat.

Section & Questions	Evaluation Guide / Indicators
<p>Section 1: Source Check</p> <ol style="list-style-type: none">1. In one sentence, what are you building or fixing—with no metaphors or mission-statement language?2. What will be true in 90 days if this retreat works?3. What will it cost you—financially, relationally, reputationally—if you do not act on this in the next quarter?	<p>Goal: Assess if the foundational "why" is completely locked in.</p> <p>Green Flags: Exceptional clarity, highly definitive timelines, concrete numbers, or objective outcomes.</p> <p>Red Flags: "I am still figuring out what I really want" or "I am exploring a few directions." (Indicates early-stage processing; not ready for execution).</p>
<p>Section 2: Pressure Check</p> <ol style="list-style-type: none">1. What have you already tried that did not work?2. What is the actual obstacle? Be specific—not general concepts like "fear," but the concrete structural thing in your way.3. Who or what have you already lost patience with regarding this issue?	<p>Goal: Determine if resistance has been metabolized or if they are still actively stuck within it.</p> <p>Green Flags: High specificity, clear operational context, and a healthy sense of urgency or constructive frustration.</p> <p>Red Flags: Overly therapeutic or diagnostic language about themselves. (Indicates they are still processing the friction rather than preparing to break through it).</p>

Section & Questions	Evaluation Guide / Indicators
<p>Section 3: Readiness for Kinetic Action</p> <ol style="list-style-type: none"> 1. If you walked out of this retreat with the objective completely built, launched, or decided, what changes on Monday morning? 2. On a scale of 1–10, how much of this depends on someone else's permission or buy-in? 3. What has stopped you from executing this on your own up to this point? 	<p>Goal: Gauge immediate capacity for operational velocity and direct autonomy.</p> <p>Green Flags: Low numerical scores on external permission (the candidate is the final decision-maker). Primary bottlenecks identified as bandwidth, structural isolation, or the need for a dedicated forcing function.</p> <p>Red Flags: High permission scores or answers indicating fundamental uncertainty regarding what steps to take.</p>
<p>Section 4: Values Alignment</p> <ol style="list-style-type: none"> 1. What is non-negotiable for you in how you lead or build? 2. Describe a specific time you walked away from capital or status because it conflicted with your core principles. 	<p>Goal: Filter for cohort alignment and mutual room respect.</p> <p>Application: This section serves as a cultural fit benchmark to safeguard dedicated implementation sprints from ethical or philosophical debates.</p>

Scoring & Routing Matrix

- **Direct Admission:** Candidates exhibiting precise, strong responses across Sections 1 through 3 qualify for the retreat or intensive.
- **Strategic Referral:** Candidates displaying a clear objective (Section 1) but lack clarity or operational readiness regarding resistance and execution (Sections 2 or 3) should be routed to trusted alignment or foundational partners, with an invitation for future cohorts.
- **General Hold:** Highly vague responses across all categories indicate the candidate is not a current fit. Provide a supportive, open-ended response encouraging them to re-engage once operational goals clarify.