

## THE AEYECRM FRAMEWORK

# The 7 Principles

*Drawn from Robbins, Abraham, Ziglar, and Covey. Refined across hundreds of family-business conversations.*

## 1 Strategy of Preeminence

*Fall in love with the client, not the product.*  
Be their most trusted advisor.

FROM: JAY ABRAHAM

## 2 Seek First to Understand

*Listen deeply before prescribing.*  
Diagnose before digitalizing.

FROM: STEPHEN COVEY

## 3 Massive Action, Measured Results

*Bring urgency — and obsessive measurement.*  
No slow deaths.

FROM: TONY ROBBINS

## 4 Help Enough People Get What They Want

*Our success is a byproduct of their transformation.*  
Never the other way around.

FROM: ZIG ZIGLAR

## 5 Optimize Before You Innovate

*Systematize what exists before chasing shiny objects.*  
Paper before software.

FROM: ABRAHAM · ROBBINS

## 6 Build the Bridge Between Generations

*Transfer trust, not just data.*  
Respect the old. Empower the new.

FROM: COVEY · AEYECRM

## 7 Make the Business Ready — Stay or Sell

*Build for both outcomes. Always.*  
Optionality is the prize.

FROM: AEYECRM

— Print it. Frame it. Make it the editorial filter for every decision you make about how the business gets built and handed off. —

## HOW TO USE THE FRAMEWORK

# The 7 Principles — in practice

Each principle comes with a single editorial test. When you're building something for the business — a process, a page, a script, a meeting agenda — run it past at least one of these.

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| <p><b>1</b> <b>Strategy of Preeminence</b><br/><i>Fall in love with the client, not the product.</i></p>                    | <p><b>Editorial test:</b> Does this content put the client's outcome ahead of our offering?</p>          |
| <p><b>2</b> <b>Seek First to Understand</b><br/><i>Listen deeply before prescribing.</i></p>                                | <p><b>Editorial test:</b> Does this content start with a question or a finding, not a pitch?</p>         |
| <p><b>3</b> <b>Massive Action, Measured Results</b><br/><i>Bring urgency — and obsessive measurement.</i></p>               | <p><b>Editorial test:</b> Does this push the reader to act and set a way to measure it?</p>              |
| <p><b>4</b> <b>Help Enough People Get What They Want</b><br/><i>Our success is a byproduct of their transformation.</i></p> | <p><b>Editorial test:</b> Is the success in this content the founder's success, not ours?</p>            |
| <p><b>5</b> <b>Optimize Before You Innovate</b><br/><i>Systematize what exists before chasing shiny objects.</i></p>        | <p><b>Editorial test:</b> Does this respect what the business already has before recommending tools?</p> |
| <p><b>6</b> <b>Build the Bridge Between Generations</b><br/><i>Transfer trust, not just data.</i></p>                       | <p><b>Editorial test:</b> Does this honor the founder while making room for the successor?</p>           |
| <p><b>7</b> <b>Make the Business Ready — Stay or Sell</b><br/><i>Build for both outcomes. Always.</i></p>                   | <p><b>Editorial test:</b> Would this serve a founder staying 20 years and one exiting in 18 months?</p>  |

— *The framework is the constitution.*  
*Every module is just a way of living inside it.* —

Philip Shannon · AeyeCRM · The Succession Readiness Academy  
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