BOARDROOM V BEDROOM — THE PLAYBOOK

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Six documents that keep the boardroom and the bedroom in separate rooms. Print them, fill them in, use them. From the book by Eric Purvis with Joe Walsh.

> Not legal, financial or relationship advice — get your own before acting. Do *one* of these this week; don't try to do all six at once. Start with the advisory board — it makes every other one easier to introduce.

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1. ADVISORY BOARD CHARTER — YOUR CIRCUIT BREAKER

- **Purpose:** set direction, and take a neutral position on business disputes so they don't run through the marriage.
- **Members:** 3–4 people with skills or scars you lack (not mates who'll just agree).
- **Cadence:** meets monthly / six-weekly, with real numbers circulated beforehand.
- **Authority:** advisory — but you commit not to override it without going back and explaining why.
- **Record:** every decision minuted. "The board's position is X."

ROLE	NAME	SKILL THEY BRING	CONFIRMED
Chair			
Member			
Member			

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2. ROLE & ACCOUNTABILITY SHEET — ONE PAGE PER PERSON (SPOUSE ESPECIALLY)

FIELD	FILL IN
Name / hat (owner? governance? management?)	
Areas I own (one owner per area)	
The 3–5 numbers I'm accountable for	
What "good" looks like this quarter	
Decisions I can make alone	
Decisions that go to the board / to us both	

3. MONTHLY SCORECARD — NUMBERS, NOT MOODS

Review against the number, never against the person.

AREA	KEY NUMBER	TARGET	THIS MONTH	R / G	OWNER
Revenue					
Wages % of revenue					
Margin (café/product)					
Marketing → bookings					
Cash at bank					

4. GROW / SELL / COAST MATRIX — DECIDE EARLY, FROM STRENGTH

QUESTION	GROW	SELL	COAST
Is the market there for more?			
Do I have capital + appetite?			
Can this team carry it?			
What's the clean price today?			
Where am I in the lease clock?			
What does my gut say at 3am?			

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5. "WHAT IF?" PROTECTION CHECKLIST — DO THIS WHILE YOU STILL LIKE EACH OTHER

- [ ] I know exactly who legally owns the business, through which entity.
- [ ] There's a written shareholders'/partnership agreement.
- [ ] There's a buy-sell agreement covering death, disability, divorce and exit.
- [ ] The price method for a buy-out is pre-agreed (not "we'll work it out").
- [ ] Personal guarantees are documented and understood by both of us.
- [ ] The family home is not casually tangled into the business's debts.
- [ ] A neutral third party (accountant/lawyer) has read it and stress-tested it.
- [ ] We reviewed it in the last 24 months.

6. THE HARD CONVERSATION — PREP SHEET

PROMPT	MY ANSWER
The shared goal I'll open with	
The specific, factual issue (no character words)	
The number / scorecard item that shows it	
What I'm asking to change (the role, not the person)	
What I'm willing to give / compromise	
Do we need a neutral third party in the room?	
The outcome I'd be genuinely happy with	

Six documents. A weekend of work. The difference between a family business that survives a shock and one that becomes a weapon. — Eric & Joe