

Companion to *The Self-Managing Business*  
by Dr. Philip Zimmermann

# The Self-Managing Business

Field Guide

A Practical Workbook  
for Founders Ready to  
Build a Business That  
Runs Without Them.



FROM THE AUTHOR

# Why This Field Guide Exists

*Dr. Philip Zimmermann*

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For a long time I assumed that people just need the right information and everything will work out. Give them the right strategy, the right principle, the right framework, and change would follow naturally. I believed this with my whole heart.

So I gave more workshops. More lectures. More speeches. I published books and studied relentlessly to become the absolute best communicator I could be. I wanted to see real change happening to the people who were listening. Not polite nods. Not scribbled notes. Real, lasting transformation in their lives and businesses.

But the whole thing frustrated me. Deeply.

Because sometimes I spoke to a thousand people live. They said goodbye with a roaring applause. They wanted autographs. They wanted photos with me. And when I looked closely, there were very, very few who actually experienced change. Very few whose businesses looked different six months later. Very few whose families noticed anything had shifted.

That is frustrating when you genuinely want to help people experience a beautiful life.

On top of that, I could not understand it. I was convinced my ideas, strategies, and concepts were sound. They had changed my own life and my own work. And I saw again and again that those who actually implement them see real transformation. The results were never in question. The implementation was.

And therein lies the problem. That is where my thinking error was.

On average, only one in a hundred workshop participants achieves their goal. One. Not because the other ninety-nine lack intelligence or ambition. But because that one person managed to put into practice what they heard. The other ninety-nine were happy to get even more information. They took notes. They were excited about what they were learning. But they did not put it into action. They went home to the same inbox, the same fires, the same exhaustion, and the beautiful ideas got buried under the weight of the urgent.

And then I realized something that changed everything I do:

**Information alone is not enough.**

We need two things to experience real change.

## 1. We need the right information.

I am still convinced that we all need the right strategies, concepts, and ideas to reach the next level. I love designing strategies that can help business owners break through. Every problem, every challenge, every frustration is often just one good idea away from being solved. One process. One system. One design can make all the difference.

That is what the book gives you. The map.

## 2. We need to implement what we learn.

But we also need to apply and implement the right information into our lives and businesses. Knowing the path and walking the path are not the same thing. And the gap between the two is where most people live their entire professional lives.

### **True positive change = the right information + implementation.**

Do not just become excited about good information. Become obsessed with implementing and applying it to your life and business. Transformation does not happen by accident. You do not fall into a self-managing business. You build one. Piece by piece. System by system. Decision by decision.

Now, there are a very few among us who hear the right information and just implement it. If that is you, wonderful. Go. You have the map now. Run with it.

But most of us have a thousand things we are handling right now that are urgent, and we get distracted every time we want to implement something we know would work. The fires keep burning. The inbox keeps filling. The team keeps waiting. And the beautiful strategy from the conference sits in a notebook that never gets opened again.

You are not alone in this. This is the human condition for every founder I have ever worked with.

### **That is why this Field Guide exists.**

This workbook is not a summary of the book. It is a bridge between knowing and doing. Every chapter follows the same structure: the core lesson distilled, one powerful exercise that forces you to apply it to your specific business, a concrete commitment with a deadline, and a Trap Watch to catch the predictable ways you will sabotage yourself.

The exercises are designed to be done with a pen, not just your mind. Thinking is not doing. Writing is the first step of doing. And sharing what you write with your team is the step that makes it real.

This guide will be uncomfortable. It will ask you questions you have been avoiding. It will hold a mirror up to patterns you have justified for years. Good. Discomfort is the tuition for clarity.

Use it. Mark it up. Argue with it. But above all, do the work.

Because the only difference between the one who transforms and the ninety-nine who do not is this: the one did the work.

*To your freedom,*

**Dr. Philip Zimmermann**

*Co-Founder, Medici Global Ventures*

medicilegacy.com

## Does It Run Without You?

The Self-Managing Score™



That question followed Mark from the courtyard in Florence all the way back home on the last page.

It will follow you too.

The Self-Managing Score™ is a free assessment that measures your business across ten categories and returns your score out of 100, your current stage, your three biggest structural gaps, and one specific action for each. Honest, specific, and written for the situation you are actually in.

Take three minutes. Find out where you stand and take the first step toward a business that runs without you.

[quiz.medicilegacy.com](https://quiz.medicilegacy.com)









## The Commitment

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I will transfer ONE task from my Dependency Inventory to a team member by \_\_\_/\_\_\_/\_\_\_. I will record a video of myself performing the task or provide written instructions.

My specific commitment and deadline:

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## Trap Watch: How Founders Sabotage This Lesson

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- The Phantom Handoff: You delegate but keep checking daily, undoing the autonomy.
- The Quality Trap: You take it back after the first mistake, proving delegation is conditional.
- The Martyr Story: “I don’t mind the long hours. I’m built for this.” Ask your family if they agree.
- The Someday Promise: “I’ll step back once we hit [revenue target].” You’ve said this before.

“A man walking north cannot arrive south, no matter how sincerely he wishes it.” — Cosimo de’ Medici, *The Self-Managing Business*

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CHAPTER 1

# Cosimo's First Question

“*Make up your minds that happiness depends on being free, and freedom depends on being courageous.*” — Thucydides

## The Core Lesson

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Cosimo asks Mark one question: “Does it run without you?” If your team waits for you to begin, if decisions pile up in your absence, you do not own a business. You own a job. The shift from founder-dependent to founder-designed is not about hiring better people. It is about creating a structure so clear that capable people can act within it without asking permission. Write the charter. Define the limits. Let them keep score.

## The Exercise: The Charter Draft

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Cosimo says: “I do not need men who read my thoughts. I need men who can think for themselves, within a structure I have made clear.” Write a first-draft charter for the most important role on your team.

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Role and person's name:

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Decisions this person CAN make without asking me (list at least five):

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Decisions this person MUST escalate to me (be specific, not vague):

How success in this role is measured (not by my feeling, by a number or outcome):

What written instructions will I provide so they can act in my absence?









## Trap Watch: How Founders Sabotage This Lesson

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- Perfectionism paralysis. The map does not need to be perfect. It needs to exist.
- “My business is too complex for one page.” Cosimo’s reply: If it doesn’t fit on one page, you don’t understand it yet.
- Writing procedures nobody reads. A blueprint only works if your team knows it exists and follows it.
- Replacing the person instead of fixing the gap. Mark blamed James for two years. The system was the failure.

“*You cannot scale chaos. The fires stop when the building is designed so they cannot start.*” —  
Cosimo de’ Medici, *The Self-Managing Business*

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CHAPTER 3

# The Duomo Effect

| *“I propose to build for eternity.”* — Filippo Brunelleschi

## The Core Lesson

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You are the scaffolding. Every time someone needs your approval, every time a decision waits for you, that is scaffolding. The Duomo teaches us that the goal is not better scaffolding. It is a structure that no longer needs it. A project requires genius. A process requires discipline. Your business needs far less of the first and far more of the second. Stop treating repeatable work as if it were new every time.

## The Exercise: Projects vs. Processes Audit

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Leonardo says: “Most business owners spend all their time treating processes as if they were projects.” List your team’s recurring work and honestly categorize it.

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List five things your team does repeatedly that are still handled as if they were brand new each time:

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For each one: What would it look like as a documented, repeatable process?

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Which one, if standardized this week, would save the most time?

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Where have I replaced someone else's scaffolding with my own? (Be honest.)

## The Commitment

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I will turn ONE recurring project into a documented process this week. The process is:

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My specific commitment and deadline:

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## Trap Watch: How Founders Sabotage This Lesson

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- Believing you need genius for everything. You need genius for the dome. You need discipline for the mortar.
- Confusing movement with growth. Movement is not growth. Alignment is growth.
- Rebuilding what your team built because it's not how you would have done it.
- Every quarter a new direction. Why?

“*The best systems disappear. What remains is harmony.*” — Leonardo, The Self-Managing Business

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Score your alignment (1–10): Is your gain never at the client’s expense? Evidence:

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Name five clients who would write you a ‘letter of proof’ today. If you can’t name five, why not?

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What is ONE thing you will do this week to begin deliberately building reputation?

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CHAPTER 5

# The Medici Gate

| *“He who is everywhere is nowhere.”* — Seneca

## The Core Lesson

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If your business is for everyone, it is for no one. Exclusivity is not arrogance. It is stewardship. It protects your energy, your reputation, and your clients. Some clients weaken you. Others elevate you. Wisdom lies in choosing whom to serve. Those who pay most often value most. Those who pay least often demand most. The Medici never advertised. They were spoken of in courts and councils.

## The Exercise: The Gate Design

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Cosimo says: “Identify your highest-value clients. Create an offering so rare it feels like a privilege to hold.”

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Name your top five clients/relationships that truly elevate your business and reputation:

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Name the clients or types of work that drain more than they give. Be ruthless:

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## Trap Watch: How Founders Sabotage This Lesson

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- Treating every engagement like it has no tomorrow, then wondering why growth is hard.
- Thinking multiplication means selling more stuff. It means deepening relationships.
- Hope marketing: we do things and hope people find us.
- Starting from zero each time. A bank that closes every account needs a thousand new clients to survive.

“*The first transaction is an investment, not a return. You are buying a relationship. The return comes from what follows.*” — Cosimo de’ Medici, *The Self-Managing Business*

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CHAPTER 7

# The Trust Advantage

| *“Trust, like the soul, never returns once it is gone.”* — Publilius Syrus

## The Core Lesson

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Trust is safety. Safety is loyalty. Clients stay not because you are the cheapest or flashiest, but because they feel safe. The same is true for your team. A competitor can always lower a price. But if your clients feel their fortunes are steadier in your hands, they will not leave. Presence is not the same as availability. Availability is reactive. Presence is deliberate. You show up before anyone asks.

## The Exercise: The Trust Inventory

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Cosimo says: “You must be present not only when needed, but when unseen. Presence builds permanence.”

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Name three clients you have not spoken to in over 60 days (outside of a project). Why?

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Name three team members whose trust in themselves you may have damaged. How?

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CHAPTER 9

# Cosimo's Secret of Leadership

“*The first method for estimating the intelligence of a ruler is to look at the men he has around him.*” — Niccolò Machiavelli

## The Core Lesson

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Leadership is measured not by how many decisions you make, but by who you choose to make them in your place. A leader does not build an army of followers. He builds a network of leaders. Hire for character. Train for skill. Invest in people before they are ready. Failure is not a sign of poor leadership. It is the tuition you pay to grow new leaders.

## The Exercise: The Leadership Elevation Plan

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Cosimo says: “You develop leaders before the role exists. When the future arrives, it is too late to build the people who must carry it.”

Name the person on your team with the most buried potential. What initiative have you punished?

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What responsibility could you give them this week that would stretch them (not break them)?

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## The Commitment

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I will elevate ONE person this week with a specific new responsibility and written authority.

Person: \_\_\_\_\_

Responsibility: \_\_\_\_\_

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My specific commitment and deadline:

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## Trap Watch: How Founders Sabotage This Lesson

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- Hiring employees, not leaders. Looking for people who can do the job instead of carry the company.
- Punishing initiative and rewarding hesitation, then wondering why nobody takes ownership.
- Believing your team is not ready. They are waiting for you to believe in them first.
- The ego trap: needing to be the answer to every question.

“*The business must not depend on me. It must depend on my leaders.*” — Mark Reynolds, The Self-Managing Business

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CHAPTER 10

# Systems Over Supervision

| *“Whatever has occurred in the past will repeat itself in the future.”* — Francesco Guicciardini

## The Core Lesson

Supervision controls people. Systems release them. Three foundations: decision authority (who decides what), reporting rhythms (numbers arrive before questions), and review cycles (adjust the system, not the people). If you rely on supervision, you will always be exhausted. If you rely on systems, you will be free. Do not write manuals. Write playbooks. Manuals are forgotten. Playbooks are used.

## The Exercise: The Three Foundations

Cosimo says: “If I had to ask a governatore whether his branch was profitable, he had already failed. The numbers arrived before the questions.”

**DECISION AUTHORITY:** Who decides what in your company, and where is it written? For each team member, list the decisions that are theirs alone.

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**REPORTING RHYTHMS:** How is your team currently reporting to you?

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CHAPTER 11

# The Lean Powerhouse

“Perfection is achieved not when there is nothing more to add, but when there is nothing left to take away.” — Antoine de Saint-Exupéry

## The Core Lesson

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The Medici ran Europe with twelve people. Simplicity is strategic. Matteo the winemaker says: measure the work, not just the harvest. Goals tell you where you have been. Activities tell you where you are going. One board. Five numbers. Green, yellow, red. The more you strip away, the more you see. Complexity steals clarity. Clarity creates mastery. Growth is not addition. Growth is refinement.

## The Exercise: The One Board

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Matteo says: “If I need more than one board to understand my vineyard, I have made it too complicated.” Design your board.

What are the five weekly ACTIVITIES (not results) that actually move your business forward?

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For each: Who owns it? How is it measured? What does green/yellow/red look like?

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## The Commitment

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Together with my team, I will identify my five leading activities and make them visible to the entire company by \_\_\_/\_\_\_/\_\_\_.

My specific commitment and deadline:

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## Trap Watch: How Founders Sabotage This Lesson

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- Measuring only the harvest. Revenue is a lagging indicator. Measure what grows it.
- Adding complexity when you feel restless. Resist the noise.
- Believing lean means less. Lean means clarity.
- Fear of pruning. The vineyard survives drought because it is pruned hard in spring.

“Goals tell you where you have been. Activities tell you where you are going.” — Matteo, The Self-Managing Business

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## The Commitment

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I will write and send a clear decision matrix to my team by \_\_\_/\_\_\_/\_\_\_ that states who owns what, with no ambiguity and no need for my approval.

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My specific commitment and deadline:

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## Trap Watch: How Founders Sabotage This Lesson

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- Stepping back in instead of stepping alongside. There is a difference.
- Making promises to your family wrapped in different words. Actions, not intentions.
- Designing the perfect system on paper but never shipping it into reality.
- Confusing urgency with importance. The urgent will always scream louder. Build anyway.

“*Don’t make promises you can’t keep. Not to her.*” — Jessica Reynolds, *The Self-Managing Business*

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CHAPTER 14

# Home

“I came away remade, as new trees are renewed when they bring forth new boughs, pure and prepared to climb unto the stars.” — Dante Alighieri

## The Core Lesson

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Everything you build, the blueprint, the systems, the trust, the autonomy, the simplicity, serves one purpose: to give you back your life. A self-managing business is not the goal. It is the vehicle. It frees you to be fully present for the people and the work that actually matter. The measure of success is not whether your business runs without you. It is what you do with the freedom once it does.

## The Exercise: The Legacy Letter

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Cosimo says: “Do not ask what you can build next. Ask who will stand taller because you built at all.” Write a letter to your future self, one year from today.

Dear Future Me, one year from now my business looks like this (describe the design, not just the revenue):

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My family experiences me this way (describe the presence, not just the provision):

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“*Do not seek freedom through effort. Seek it through design.*” — Cosimo de’ Medici, The Self-Managing Business

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