



Succession Planning for Business Owners

Pre-Work for Attendees:

To maximize the value of this workshop, participants should complete the following pre-work:

1. Assess Your Current Succession Readiness

- Identify if your business has a written succession plan. If so, when was it last reviewed?
- On a scale of 1-10, how confident are you in your current succession strategy?

2. Clarify Your Personal & Business Goals

- What is your long-term vision for yourself and your business?
- Are you leaning towards selling, transitioning leadership, ESOP, or another approach?

3. Map Key Roles & Leadership Gaps

- Who are the critical people in your business today, and what would happen if they left?
- Are there clear paths for internal leadership development?



4. Reflect on Potential Roadblocks

- What are the biggest concerns or uncertainties preventing you from making a succession plan?
- Do you foresee family, financial, or operational conflicts in succession?

5. Draft 3 Key Questions for Discussion

- Come prepared with three specific questions about your business succession that you'd like to explore during the workshop.

