

Succession Planning

What's Your Vision?

The hardest part about succession planning is the first step – asking yourself “What do I want my practice to look like after I leave?” This worksheet will guide you through the first step of succession planning, and help you determine next steps.

How to start:

You've poured your life's work into this practice. Now what? Think about what you want the practice to look like once you retire and start with Step 1 below.

Step 1: If you could snap your fingers and have the “perfect” succession, what does it look like?

Step 2: What attributes does your successor need to have?

Step 3: Look at your list from Step 2. Sort these attributes into the two sections below.

Nice to have attributes:

Non-negotiable attributes:

You now have a clear idea of the attributes your successor must possess, plus bonus attributes.

What about the culture?

Step 4: Describe your culture. List 5-10 words that your team would say defines your culture?

Step 5: Now look at that list and break it down:

Nice to have attributes (culture):

Non-negotiable attributes (culture):

Next Steps

- Summarize your findings in a clear, concise statement that others can clearly articulate on your behalf.
- Socialize with centers of influence who can assist you in moving forward.

Additional Notes:

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