

Succession Planning Worksheet

Section I: Questions about the business and your role in it:

•	Describe your company in five years' time including details such as the number of employees, annual revenue, company culture, key clients. How will it be different from today?
•	What will be your role in five years? How will it differ from today?
•	Now describe your company in ten years' time.
•	What will your role be in ten years? How will it differ from today?

What do you enjoy most about your current role?			
What do you enjoy the least about your current role?			
Section II: Questions about The Third Phase:			
 When you envision the future, beyond your current role, what do you see? (Some examples: Alternative career options, non-profit work, volunteering, leisure activities) 			
 When you think about someday leaving your business, what options appeal to you? (Some examples: Selling your business to an outside buyer or group of employees? Grooming family members to take over? Others?) 			

What is your greatest concern for the future?	

• What financial goals have you set for your future retirement? What level of

annual income do you think you will require?