

THE EXITMAP® MANAGEMENT SUCCESSION WORKSHEET

This worksheet should be used with your trusted advisor. As part of your transition Road Map, you need to anticipate a planned transfer of the management duties that you still perform as the owner.

Please enter the names of persons currently responsible for these duties and who will be expected to assume them by the end of a transition. If a specific duty is not applicable to your business, please note it as N/A in the Status field.

In the Status field next to the Successor's name, please enter their current ability to handle the job:

- 1 – Untrained with little or no experience in this area
- 2 – Can perform the function with assistance
- 3 – Already assumes full responsibility in this area

DAILY SUPERVISION	Current	Successor	Status
Sales			
Accounting			
Production			
Marketing			
Research & Development			
Administration			
Information Technology			
Other:			

PRODUCTION	Current	Successor	Status
Quality Control			
Production Scheduling			
Manufacturing			
Product Delivery			
Logistics			
Dispatch and Delivery			
Procedures			
Other:			

PURCHASING	Current	Successor	Status
Inventory/ Raw Materials			
Price Negotiations			
Vendors			
Selection			
Relations			
Contracts			
Capital Equipment			
Supplies			
Other:			

SALES	Current	Successor	Status
Attracting New Customers			
Maintaining Key Customers			
Sales Management			
Incentives			
Pricing			
Other:			

MARKETING	Current	Successor	Status
Advertising			
Design			
Ad Buys			
Collateral (e.g. Brochures)			
Web and Social Media			
Printing			
Messaging			
Budget			
Other:			

TECHNOLOGY	Current	Successor	Status
Specifications			
Backups			
Security			
Maintenance and Upgrades			
Repairs (Help Desk)			
Research			
Other:			

PHYSICAL PLANT	Current	Successor	Status
Landlord Duties			
Maintenance and Repair			
Improvements			
Expansion/Relocation			
Other:			

HUMAN RESOURCES	Current	Successor	Status
Hiring (by employee levels)			
Entry level			
Skilled or Technical			
Supervisors			
Managers			
Executives			
Salespeople			
Other: Administrative			
Employee Reviews			
Entry level			
Skilled or Technical			
Supervisors			
Managers			
Executives			
Salespeople			
Other/Administrative			

HUMAN RESOURCES (CONT'D)	Current	Successor	Status
Wages/Raises/Incentives			
Entry level			
Skilled or Technical			
Supervisors			
Managers			
Executives			
Salespeople			
Other/ Administrative			
Training/ Certification			
Benefits			
Payroll			
Employment Policies			
Compliance			
Employment Contracts			

FINANCE/ACCOUNTING	Current	Successor	Status
Bookkeeping			
Generating Financial Reports			
Cash Flow Management			
Banking Relationships			
Account Collections			
Payables			
Insurance			
Budgeting			
Sponsors			
Liaison with Accounting Firm			
Tax Reporting			
Other:			

LEGAL	Current	Successor	Status
Attorney Selection			
Contracts			
Litigation			
Compliance			
Other:			

PLANNING	Current	Successor	Status
Strategic Plan			
Goals and Objectives			
Mission and Vision			
Core Values			
Industry Analysis			
Alliances and Relationships			
Other:			

Are there any other assigned duties specific to your industry that aren't included above?
Please list: