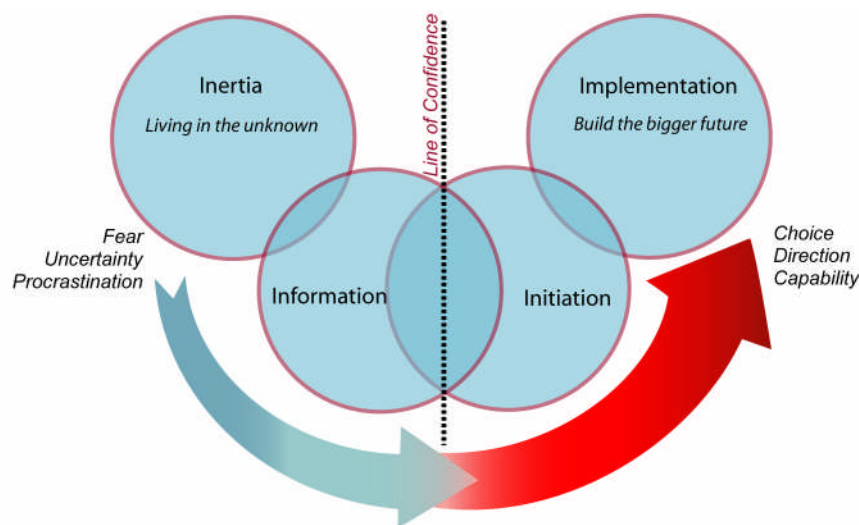


The CONTINUITY Approach to Succession Planning

In all areas of life, and in every action we take, we begin in what we describe as the **Inertia Stage** where we are unclear or unsure about how to proceed.

Whether it's a lack of information, a little uncertainty, a deeper fear, or just plain old procrastination that stops us, we need to gather enough information to allow us to move forward with confidence. We refer to this as moving through the **Information Stage**.



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Once across the **Line of Confidence**, we can focus on developing the appropriate strategies and action items to move into the **Initiation Stage** where we gradually complete the action items identified. Ultimately we reach the **Implementation Stage** where we can celebrate the achievement of our goal.

The CONTINUITY Approach to Succession Planning

We use this same concept to help business owners plan for any transition of their business, be it start-up, growth, a merger or acquisition, or the inevitable “sale” to someone within the business or outside the business.

The left side of the chart is called the **Learning Phase**. This is where we, as your business advisor, use a variety of tools designed to inform you (and your partners or family) and ultimately develop your confidence in addressing the changes that are required to reach the next level of success.

The other side of **The Line of Confidence** chart is the **Communication Phase**. Here we guide partner or family groups through the process of working together to address all roadblocks to their common vision ~ that bigger future.

