

Exit / Succession Readiness Toolkit — Read Me First

A practical pathway to reduce owner dependence and increase business value.

An exit (sale or succession) rarely succeeds by accident. This toolkit helps you build a business that can run without you: clean financials, clear systems, reliable people, and documented value drivers.

Outcome (what you'll have completed)

- An exit readiness scorecard (know where you're strong/weak).
- A 'value drivers' checklist and improvement plan.
- An owner dependence reduction plan (so the business runs without you).
- A buyer / successor pack index (what you need ready).
- A 12-month exit/succession action plan (Excel).

Important note

This toolkit is general guidance only and does not replace professional legal, tax, or valuation advice. Use it to get organised and to have better conversations with your advisers.