

# SUCCESS IN SUCCESSION™

An Exclusive Program for Controlling Owners & Next Generation Partners

## PROGRAM MISSION

The mission of the **Success in Succession™** program is to help Controlling Owners and their Next Generation Partners better clarify succession goals and challenges through individual work and joint work together. Clarification without forward progress, however, is not enough. The further mission of the work is to create a plan and actions to forward the success process in a way that fully serves the Controlling Owner, the Next Generation Partners, and create a well-prepared and smooth succession journey.

For information and fee structure:  
[info@clientwise.com](mailto:info@clientwise.com)

## PROGRAM LEARNING OBJECTIVES & TOPICS

### Controlling Owners Learning Objectives

- ▶ Learn what they seek to design in terms of a succession or will have checked in on what they have already designed.
- ▶ Design what value they seek to realize on their practice at exit.
- ▶ Complete a current state analysis, including understanding what talents and gaps sit in your next generation and what issues need to be addressed
- ▶ Articulate your expectations of the Next Generation Partners and yourself while on the path to succession
- ▶ Co-create part or all of the roadmap for succession

#### Topics

1. Defining the Next Phase
2. Defining the Perfect Exit
3. Designing What You Want from the Practice Until You Exit
4. Understanding the Present
5. Valuing Your Firm
6. Understanding Your Current State of Succession—Strengths and Gaps

### Next Generation Owner/Partner Learning Objectives

- ▶ Know what they want for their future.
- ▶ Know what it takes to be a partner and owner.
- ▶ Understand what the path to partnership and ownership involves.
- ▶ Articulate your expectations of the Controlling Owner and yourself while on the path to succession.
- ▶ Creating a Roadmap to Success in Succession Together

#### Topics

1. Defining the Next Phase of Your Professional Life
2. Defining the Perfect Succession
3. Designing Ideal Successors
4. Understanding the Present
5. Valuing the Firm
6. Understanding the Current State of Succession—Strengths and Gaps
7. Creating a Roadmap to Success in Succession Together

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GET CLEAR. GET FOCUSED. GET RESULTS.™