

Stepping Up. Stepping Back.

Securing the Future of Your Business.

Succession Planning Programme

Funding available through your Local Enterprise Office (LEO)

Most small business owners think of succession planning as something legal, financial, or tax-related. While those elements are important, they only come at the very end.

True succession begins much earlier — with **people, systems, clarity, and confidence.**

We focus on the practical, operational, and behavioural side of succession: preparing the next generation to step up, and helping the current leadership to step back.

Succession isn't just about leaving.

It's about leading in a different way, and creating a business that can thrive without your constant involvement.

Two Pillars of Our Approach

1

People Preparation

Developing successors, leadership capability, and accountability within the team.

- Identifying and developing future leaders
- Role & responsibility definition
- Decision-making clarity and trust-building
- Strengthening communication and feedback skills
- Team alignment on goals, values, and standards
- Owner coaching to build confidence in letting go

2

Process Preparation

Creating the structure and systems that allow the business to run consistently and independently.

- Process mapping & SOP development
- "Day-In-The-Life-Of" (DILO) analysis for role transfer
- Leader Standard Work routines
- Dashboards and metrics for visibility
- Business Bible / Operating Manual development
- Succession Readiness Checklist

What's Involved

- 1:1 Coaching for the owner and identified successors
- Workshops on SOP creation, delegation mapping, and team roles
- Cross-training sessions to build resilience and coverage

Key Outputs

- Defined succession plan and timeline
- Delegation map — who is stepping up into what
- Clear roles & responsibilities for the leadership team
- Documented SOPs and operating standards
- A complete Operating Manual for the business
- 6–12 month action plan for embedding change
- Strengthened manager capability and ownership

Why Small Businesses Choose This Programme

The Succession Planning Programme is designed specifically for owner-managed and people-dependent small businesses.

This programme suits owners who:

- Have an established business
- Are thinking about stepping back over the next 1–5 years
- Want to reduce daily involvement without compromising quality
- Want the business to continue thriving, with or without them
- Want structured support for building leadership capability and documenting processes

It is ideal for:

- Owner-operators who want the business to run more independently
- Family businesses preparing the next generation or key staff
- Businesses where long-serving employees may step into leadership
- Founders ready to return to strategic work rather than day-to-day operations

Case Studies

Case Study 1 — Family-Run Service Business

Preparing for a smooth leadership transition while maintaining culture and standards

Founders ready to hand over day-to-day operations but lacked clarity on who would lead and how responsibilities would be divided.

Managers struggled with accountability and giving corrective feedback.

Used Role Canvases, delegation mapping, and coaching-style leadership techniques to support emerging managers.

Impact:

- A transparent and agreed succession roadmap
- Managers became more confident leading staff and handling difficult conversations
- Founders reduced hands-on involvement, focusing on strategic direction
- Improved consistency and communication across the leadership team

Case Study 2 — Health & Wellness Business

Strengthening leadership capability for future growth

Owner overwhelmed by operational demands; two senior team members talented but uncertain about stepping into bigger roles.

Used personal development plans, a succession readiness checklist, and regular coaching.

SOPs ensured consistency; recruitment and role-planning tools prepared the business for future hires.

Impact:

- Clearer distribution of responsibilities between owner and team
- Increased confidence among senior staff to handle performance issues
- Better recruitment planning using the New Role Canvas
- Owner transitioned into growth-focused work
- Feedback: "As founder owners we have found this training so beneficial as it has given us the confidence to step back from the business and had over more responsibility to our manager and assistant manager as they have really grown and developed with Julie's guidance"

Case Study 3 — Education Organisation

Developing future leaders with structure, confidence, and clarity

Organisation relied heavily on the founder for decision-making.

Managers were technically strong but needed development in leadership and independent decision-making.

Leadership assessments, coaching, SOP workshops, and values alignment sessions created a shared operating rhythm.

Impact:

- Managers demonstrated stronger leadership presence and accountability
- Clear role definitions reduced duplication and confusion

- Decision-making became more distributed and consistent
- A long-term succession plan gave the founder confidence to step back gradually

Case Study 4 — Technical Project-Based Team

Ensuring continuity amid future workforce uncertainty

Senior leader wanted to ensure continuity and reduce risk if key staff left.

Challenges: inconsistent use of project tools, limited documentation, unclear succession.

DILO analysis, SOP creation, succession interviews, and structured knowledge-transfer were introduced.

Impact:

- Clearer visibility of who could step into future roles
- Documented processes reduced dependency on any single individual
- Improved communication and regular leadership check-ins
- Stronger case for retaining the local site and building long-term capability

Who This Programme Is Not For

This programme is designed around people-based, owner-reliant small businesses — where knowledge, relationships, and culture live mainly inside the owner's head, and where stepping back requires preparation rather than a sudden handover.

It is not suitable for:

- Sole traders who plan to sell the business directly to investors without developing internal successors
- Businesses requiring legal, tax, or financial succession planning (e.g. share transfer, wills, restructuring)
- Owners who want rapid exit without developing people or documenting processes
- Businesses in the early start-up stage with no team to step up
- Owners expecting a "done for you" handover without actively participating in the process
- Situations where the real need is HR/legal intervention rather than leadership development

Ready to secure the future of your business?

Contact us to find out how the Succession Planning Programme can work for you.

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Funding may be available for this programme