

***The steps in the transfer of management process are generally the following:***



For each of the steps in the process you should make a list of the elements or activities to complete and their respective timelines.

Be as specific and detailed as possible.

Next, write down what you have already completed up to this point. What is completed? What is left to do?

Process Steps	Elements of the Plan ( <i>examples</i> )	Timeline	Completed	To Do	Person Responsible
<b><i>Thinking about how continuity is handled</i></b>	<ol style="list-style-type: none"> <li>Thinking about and discussing the choice of a continuity model</li> <li>Communicating your thoughts to the relevant people</li> </ol>				
<b><i>Choosing and training the successor</i></b>	<ol style="list-style-type: none"> <li>Drafting a strategic action plan</li> <li>Determining the selection criteria for choosing the successor</li> <li>Review successor candidates</li> <li>Drawing up a training plan (see <a href="#">list</a>)</li> <li>Putting plan into place and follow-up</li> </ol>				
<b><i>Co-management of the company</i></b>	<ol style="list-style-type: none"> <li>Establishing the successor's development plan (see <a href="#">list</a>)</li> <li>Putting plan in place and follow-up</li> </ol>				
<b><i>Exit of the owner-manager</i></b>	<ol style="list-style-type: none"> <li>Choosing an exit strategy</li> <li>Drawing up a disengagement plan</li> <li>Putting plan in place</li> </ol>				