

Where does it live today?

For each area, choose where it really lives today, not where the org chart says it lives. Leave it blank if you are unsure.



Shared means others carry some of it. Reliably in the business means it can be carried without relying on you to notice, interpret or quietly fix it.

Area	Mostly with me	Shared	Reliably in the business
Customer relationships	☐	☐	☐
Supplier / partner relationships	☐	☐	☐
Commercial judgment	☐	☐	☐
Culture and unwritten rules	☐	☐	☐
Strategic direction	☐	☐	☐
Key decisions	☐	☐	☐
Leadership capability	☐	☐	☐
Institutional knowledge	☐	☐	☐
Talent / succession	☐	☐	☐
Operating rhythm and follow-through	☐	☐	☐

Anything sitting heavily in the first column deserves attention. On the next page, choose what needs to transfer and how you could test whether the business can carry it.

What needs to transfer first?

Choose up to three areas. A later comparison with your successor or leadership team can help reveal differences in what each believes the business can carry.

PRIORITY 1

Area

What knowledge, judgment, relationship or responsibility needs to move?

Who should carry it?

What could you test first?

PRIORITY 2

Area

What knowledge, judgment, relationship or responsibility needs to move?

Who should carry it?

What could you test first?

PRIORITY 3

Area

What knowledge, judgment, relationship or responsibility needs to move?

Who should carry it?

What could you test first?

Let's talk about succession readiness

Start with a conversation about the transition and what the business still gets from you. Beyond the Founder may be an appropriate starting point.

[Book a conversation](#)