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PROPOSED STAGES

The seven steps, from first talk to handover

See what both sides would need to check. These are proposed stages, not a timetable. Either side can change the plan or stop.

Check	Plan	Decide
Goals, people and funds	Price, rights and payment	Approval and handover

01 Start with the goal.

Describe the firm, your role and the change you have in mind.

02 Check goals, people and funds.

Compare the goals and the firm's needs with the people, time and funds the work would need.

03 Agree how to share.

Decide which facts are needed, who may see them and how they may be used before private records change hands.

04 Review the business and the work.

Check profit, cash needs, customers and the team. Name the work that depends on the owner and who could take it on.

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Terms, checks and handover

05 Shape the terms.

Set out ownership, rights, price, pay dates and future roles. Talking about terms does not make them final.

06 Check before the deal completes.

Have the right experts review the facts, risks and terms. Check the funds, who may commit each side and all required approvals before the deal can go ahead.

07 Decide and hand over.

Continue only when the agreed conditions are met. Write down who does what next, and make sure the people taking over agree.

Before private records change hands

Agree sharing permissions and a secure route.

These stages do not promise a timetable, deal or funding. Every proposed step still depends on the facts and the agreements in place.

Start with what you want to change

Describe the business, your current role and the change you are considering. That gives a first discussion a useful starting point.

Keep your completed notes private and check missing facts with your advisers.

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