Resources from the book *Transitioning from the Top: Personal Continuity Planning for the Retiring Family Business Leader* by Stephanie Brun de Pontet

Table 3.1: Centrality of Work Role

Please circle the answer to the right of each question that most closely reflects your response.

QUESTION	Score to attribute for each answer below: 1	2	3	4	5
For how many years have you been in your current role?	Less than 5 years	5 to 10 years	10 to 15 years	15 to 20 years	Over 20 years
How many hours a week do you work on average?	20 or less	20 to 40	40 to 55	56 to 70	Over 70
How hard would it be to come up with something to do if you were suddenly presented with a day free from any work responsibilities?	Very Easy	Easy	I'd figure something out	Hard	Very Hard
How often does your work or company come up in conversations when you are not at work?	Almost never	Rarely	About half the time	Pretty regularly	Always
You check and respond to phone calls, emails or texts from work in the evenings, on weekends & on vacation	Almost never	Rarely	About half the time	Pretty regularly	Always
How many substantive interests do you have outside of work to which you regularly commit time and energy?	More than 5	3 to 5	1 to 2	1	0
How many good friends do you have that have nothing to do with your work life?	More than 5	3 to 5	1 to 2	1	0
If you had to introduce yourself without referencing your work, how hard would it be to come up with a description of who you are?	Very Easy	Easy	I'd figure something out	Hard	Very Hard
TALLY YOUR SCORE (number of responses per column times the allocated score)	___ x 1	___ x 2	___ x 3	___ x 4	___ x 5
FINAL SCORE = SUM: _____	= ____ +	____ +	____ +	____ +	____

Scoring Guide 3.1: Centrality of Work Role

Understanding your Score:

- Between 8 – 20: You likely have clear boundaries to your work role
- Between 20 – 30: Suggests your work role is a dominant one for you
- Above 30: The centrality of your work role may make it harder for you to develop other aspects of your life

Table 3.2: Role Allocation

Please use the first column to allocate how you spend your time today, the second column to allocate how you would LIKE to be spending your time, and the third to note some obstacles you anticipate in moving towards that desired state.

ROLE	Percentage of your waking time (today)	Percentage of your waking time (desired allocation)	Obstacles in moving towards that desired state
Primary Work Role (job)			
Other Business or Professional Roles (Board, mentor, side ventures, trade assoc., etc.)			
Spouse			
Other Family Relationships (time with children, extended family...)			
Friends			
Engaging with Faith or Spirituality			
Volunteer			
Pursuing meaningful hobby, fitness, or sport			
Other:			
Other:			
TOTAL	**100%**	**100%**	

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Table 5.4: Assessing Family Stakeholder Readiness

Please use the below to assess the extent to which you believe various stakeholders feel 'ready' for your eventual transition out of the leadership role.

STAKEHOLDER GROUPS	GENERAL LEVEL of 'READINESS' or COMFORT with TRANSITION	VIEW OF BUSINESS GOING FORWARD...	IMPACT of TRANSITION on PERSONAL RELATIONSHIP	IDEAS on ADDRESSING CONCERNS
CURRENT GENERATION				
Your spouse	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Sibling Shareholders (if any)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Other (fill in)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
NEXT GENERATION				
Your children working in business (if any)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Your children not working in business (if any)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Other family working in business (if any)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Other family shareholders	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	
Other (fill in)	High (calm) Uncertain Low (worried)	Good Unsure Worried	Will improve Unsure Will strain	

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Table 6.1: How Ready is Your Business for Transition?

Please assess your business' level of 'readiness' on the seven dimensions below.

Evaluate your business along each of these dimensions:	Score to attribute for each answer below:				
	5	4	3	2	1
Ownership Group Alignment	Very Ready	Mostly Ready	Marginally Ready	Some Steps Taken	No Progress
Company's Position in Industry	Dominant	Strong	Good	Marginal	Weak
Financial Condition of Business	Very Strong	Strong	Modest	Marginal	Weak
Successor Capability	Excellent	Very Strong	Good	Marginal	Weak
Next Generation Management Team	Excellent	Very Strong	Good	Marginal	Weak
Professional Board of Directors	Excellent & longstanding	Very good	Getting established	Informal	Weak
Written Strategic Plan	Strong & widely supported	Solid	Being developed	Rough ideas	We don't plan
SUM of POINTS: _____					

Scoring Guide 6.1: How Ready is Your Business for Transition?

Understanding your Score:

- Below 15: Suggests some weakness in the business may complicate transition process.
- Between 16–24: The business could be strengthened further to help facilitate transition.
- Above 25: Suggests the business is in a strong position to navigate transition.

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