

ROADMAP

Your master canvas for
transitioning your business.

1

Objectives & Personal Vision

Conduct a short assessment to clearly define your personal, financial, and timeline objectives for the sale. This ensures the entire process is aligned with your desired outcome.

2

Business Readiness Assessment

Utilize a checklist to evaluate your business' current operational, financial, and legal health to identify any weaknesses that must be addressed before going to market.

3

Exit Options

Analyze and compare the various exit options (e.g., intergenerational transition, employee ownership, third party, asset liquidation) to find the most strategic path for achieving your objectives.

4

Benchmark & Gap Analysis

Conduct an analysis comparing your business's key financial and operational metrics against industry benchmarks. A self-analysis can be completed [here](#).

5

Task List & Timeline

Develop a detailed and actionable task list with assigned responsibilities and deadlines for the entire preparation and sale timeline.

6

Assemble the Advisory Team

Identify, vet, and formally engage a team of external professionals (accountant, lawyer, tax specialist, business advisor, local Small Business Enterprise Centre) to help guide the transition.

7

Sale Process Tools & Documentation

Implement tools, including checklists, to manage the documentation required for buyer outreach, negotiation, and the rigorous due diligence phase.

8

Prepare for Next Chapter

Create a plan for your post sale involvement in the business and engage a financial planner to support and protect your financial future.