

Transition Planning Guidance

Objectives

Ensure continuity for employees and customers while aligning seller's post-close goals.

Role Options

- Advisor (3–6 months): knowledge transfer and relationship handoff
- Part-time operator: specific process leadership with clear KPIs
- Full exit at close with defined availability windows

Continuity Playbook

- Customer communication templates and cadence
- Employee FAQ and retention plan options
- Systems access, credentials, and documentation checklist

Earn-out & Incentives (Illustrative)

- Simple, auditable metrics tied to value creation
- Clear floor/ceiling and dispute-resolution mechanism