WHITEWATER CONSULTING

THE WHITEWATER SUCCESSION READINESS SYSTEM™

Creating Clarity. Building Readiness. Expanding Options.

"Succession Planning isn't a timing issue, it's a readiness issue."

1 AWARENESS

Understand where you are today

- Understand owner dependency
- Identify strengths, risks & gaps
- Evaluate value & key priorities
- Align business & personal goals

KEY OUTPUT

Owner Readiness & Value Snapshot™

2 CLARITY

Identify strengths, risks & opportunities

- Evaluate across 7 dimensions
- Score readiness & continuity risk
- Identify key opportunities
- Create organizational clarity

KEY OUTPUT

Succession Readiness Scorecard™

3 STRUCTURE

Design the path forward

- Prioritize initiatives
- Design transition strategy
- Align the right advisors
- Build a phased action plan

KEY OUTPUT

Succession Readiness Roadmap™

4 EXECUTION

Move the plan into action

- Execute the plan
- Strengthen leadership & systems
- Reduce dependency & risk
- Monitor progress over time

KEY OUTPUT

Formal Succession Plan

5 CONTINUITY & READINESS

Sustain readiness. Protect what you've built.

- Business built to thrive beyond the owner
- Leadership continuity in place
- Greater control & more options
- Long-term value protected

KEY OUTPUT

Annual Succession Readiness Review & Continuity Planning

THE WHITEWATER BUSINESS OWNER **SOURCE OF TRUTH™**

01 **PHYSICAL BINDER**
The strategic roadmap

02 **DIGITAL VAULT**
The living repository

03 **ANNUAL REVIEW**
The retention engine

WHITEWATER CONSULTING

THE WHITEWATER SOURCE OF TRUTH™

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01 THE PHYSICAL BINDER

The Strategic Roadmap

A branded, structured binder serving as the owner's permanent strategic reference — built to sit on the shelf for a decade and remain the authoritative source for the business.

FIVE-TAB STRUCTURE

1. **Executive Summary**
   Owner's dashboard — revisited most often
2. **Clarity**
   Where do we stand today?
3. **Structure**
   What must be strengthened?
4. **Execution**
   How will we move forward?
5. **Continuity & Readiness**
   If you stepped away for 90 days…

02 THE DIGITAL VAULT

The Living Repository

A secure digital repository holding every living document — updated advisor contacts, org charts, key agreements, insurance, and succession materials — accessible by the owner, successors, and advisors based on tiered permissions.

THREE-TIER ACCESS MODEL

- **Owner**
  Full access — strategy, financials, succession documents
- **Successor / Key Leader**
  Operational continuity, leadership protocols, key contacts
- **Advisors**
  Coordinated view — relevant documents by role

03 THE ANNUAL REVIEW

The Retention Engine

A formal, scheduled, calendar-driven process that keeps both the binder and the vault current — producing a one-page summary each year that builds a documented history of readiness progression.

WHAT THE ANNUAL REVIEW DOES

- **Updates the Succession Readiness Scorecard™**
  Tracking progress year over year
- **Refreshes the digital vault**
  Current documents & advisor information
- **Produces a new one-page Annual Summary**
  Added to the binder each year
- **Reviews the Owner Absence Protocol**
  For current conditions
- **Aligns advisors**
  Around any changes in business, family, or owner goals

"If you stepped away for 90 days, what would happen to your business?"

After five years, the owner holds a documented history of readiness progression — a tangible asset in any transition, sale, or generational transfer.