

Business Succession and Ownership Planning

Scalewise provides a structured and independent approach to business succession and ownership planning, focused on protecting the long-term value of your business and ensuring continuity in the event of change or disruption. This service is designed to strengthen business resilience, align owners, directors, and key personnel, and ensure the company and the wealth created is not jeopardised by the loss or transition of key individuals.

Deliverables

We undertake an independent review of your shareholding structure, directors, and key resources to identify risks that could impact continuity or ownership stability. From this, we develop clear and practical crisis management plans for all critical roles, ensuring there is a defined process that can be executed if a key individual becomes unavailable. These plans provide step-by-step guidance, responsibilities, and decision-making authority, and are formally aligned and agreed by owners and directors.

We also work with business owners to methodically plan for future ownership outcomes, including preparing the business for sale, transition, or succession within the family. This ensures there is a clear pathway for owners to step back from day-to-day involvement and transition into retirement, while protecting the ongoing performance and stability of the business.

Ownership and Governance Review

- Review shareholding structures, ownership arrangements, and director responsibilities
- Identify risks relating to key individuals, ownership concentration, and decision-making
- Provide recommendations to strengthen ownership resilience and continuity

Key Person Risk and Crisis Planning

- Identify critical roles and key resources across the business
- Develop crisis management plans for each key position
- Define clear actions, responsibilities, and decision-making pathways in the event of incapacity or absence
- Ensure plans are documented, practical, and agreed by owners and directors

Business Resilience and Continuity

- Strengthen the business to operate independently of key individuals over time
- Reduce reliance on owners and key personnel through structure and planning
- Ensure the business can continue operating effectively through disruption or transition

Succession and End Game Planning

- Work with owners to define long-term objectives, including exit, sale, or family transition
- Develop structured succession plans aligned to personal and commercial goals
- Support preparation for ownership transition, including timing, structure, and readiness
- Provide guidance to enable owners to step back and transition into retirement with confidence