TheNonExec FOUNDER TRANSITION

A PRACTICAL SELF-CHECK FOR BUSINESS OWNERS

The Founder Transition Clarity Check

16 questions to help you think clearly about sale, succession or stepping back.

UNDERSTAND	EXPLORE	CHOOSE	ACT

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This is a reflection and decision-support tool. It is not a psychometric test, clinical assessment, financial plan or recommendation to proceed with a transaction.

HOW TO USE THIS CHECK

Clarity before commitment

A founder transition may involve a sale, succession, management handover, phased step-back or a decision to continue for longer with clearer boundaries. The purpose of this check is not to tell you which route to choose. It is to reveal where your thinking is clear, where assumptions need testing and where a practical next step could improve the quality of the decision.

1	2	3
Rate honestly Choose the response that reflects your current evidence and behaviour, not the answer that appears most commercially convenient.	**Notice patterns** A low rating is not a failure. Repeated uncertainty, strong reactions or a gap between intention and action are useful information.	**Choose one action** Do not try to solve everything at once. Select one conversation, decision or low-risk test to complete within 90 days.

Rating guide

1 - Not yet considered	I have not considered this in a meaningful way, or the statement is largely untrue.
2 - Early stage	Some awareness exists, but my position remains unclear, untested or difficult to act upon.
3 - Partly developed	The statement is partly true, alongside material reservations or inconsistency.
4 - Largely developed	The statement is mostly true and supported by reasonable evidence, conversations or preparation.
5 - Clear and evidenced	The statement is consistently true and demonstrated through decisions, behaviour or practical action.
NS - Not sure	I need more information, reflection or discussion before I can answer confidently.

Important: Do not rely on the overall score as a pass/fail result. One critical uncertainty may matter more than several high ratings.

THE CLARITY CHECK

Understand and explore

Rate each statement from 1 to 5, or NS. Work quickly and honestly. The reflection line is more important than producing a high score.

UNDERSTAND Clarify what is driving change

Separate long-term reasons from temporary pressure, and identify what the transition should protect.

Assessment statement	1	2	3	4	5	NS
1. I can explain clearly why I am considering a change in ownership or leadership now.	○	○	○	○	○	○
2. I can distinguish a long-term need for change from a difficult period, fatigue or temporary frustration.	○	○	○	○	○	○
3. I know which aspects of my current role I want to stop, retain or reshape.	○	○	○	○	○	○
4. I have identified the personal, family and business priorities that a transition should protect.	○	○	○	○	○	○

My key insight: What is really driving change - and what might be temporary?

EXPLORE Broaden the choices and test assumptions

Consider credible routes and examine how the decision looks from other important perspectives.

Assessment statement	1	2	3	4	5	NS
1. I have considered more than one credible route, rather than treating the decision as simply sell or continue.	○	○	○	○	○	○
2. I understand the main trade-offs between value, control, timing, risk, legacy and future involvement.	○	○	○	○	○	○
3. I can identify at least one important assumption that requires evidence or practical testing.	○	○	○	○	○	○
4. I have considered the position of my partner or family, fellow shareholders, management team and future self.	○	○	○	○	○	○

My key insight: Which assumption or perspective most needs further examination?

Choose and act

A good transition decision should be personally and commercially coherent - and supported by visible preparation rather than intention alone.

CHOOSE Define success and decision criteria

Create a clearer basis for choosing between competing routes and priorities.

Assessment statement	1	2	3	4	5	NS
1. I can define what a successful transition would mean beyond the headline sale price.	○	○	○	○	○	○
2. I know my principal non-negotiables and where I am prepared to be flexible.	○	○	○	○	○	○
3. I have considered the level of future challenge, responsibility and involvement I am likely to want.	○	○	○	○	○	○
4. I can state my preferred direction and explain the evidence, priorities and trade-offs supporting it.	○	○	○	○	○	○

My key insight: Which trade-off am I willing to accept - and which would undermine a good outcome?

ACT Translate direction into practical preparation

Use conversations and low-risk tests to create evidence, confidence and momentum.

Assessment statement	1	2	3	4	5	NS
1. I have begun the important conversations with the people most affected by the transition.	○	○	○	○	○	○
2. I am testing greater delegation or management autonomy rather than waiting for a transaction.	○	○	○	○	○	○
3. I have identified the professional and personal support I may need during the transition.	○	○	○	○	○	○
4. I am willing to make one visible commitment within the next 90 days.	○	○	○	○	○	○

My key insight: What action would demonstrate that preparation has genuinely begun?

YOUR CLARITY SNAPSHOT

Turn insight into a useful next step

Add the four ratings in each section. Use the ranges as a prompt for discussion - not as a verdict on whether you should proceed.

Section	Score /20	Current position	What requires attention?
Understand	____		
Explore	____		
Choose	____		
Act	____		

4-8	Largely unaddressed - an important area for clarification or support.
9-14	Developing - some clarity exists, alongside material questions or inconsistency.
15-20	Clearer and evidenced - retain attention to any single low item or unresolved concern.

My 90-day founder clarity plan

Choose no more than three actions. The best action is specific, within your control and capable of creating new evidence.

No.	Conversation, decision or practical test	Support needed	By when
1			
2			
3			

> **A useful question:** What would be different in 90 days if I took this action seriously?

WHAT HAPPENS NEXT?

Clarity is valuable.
A considered next step changes the outcome.

Caroline offers confidential Founder Clarity sessions for business owners considering sale, succession or a significant step back. The work is structured, commercially grounded and designed to help you understand your position, examine your choices and translate a preferred direction into practical preparation.

A private pilot engagement may include:

- A Personal Transition Readiness Questionnaire
- Four confidential one-to-one sessions
- Practical actions and low-risk tests between sessions
- A concise written Personal Transition Summary
- Optional connection to TheNonExec commercial readiness work

A limited number of private pilot engagements are available.

To arrange a confidential conversation with Caroline:

Email info@thenonexecutive.com
Visit www.thenonexecutive.com

ABOUT CAROLINE LEVINE

Founder Direction & Personal Transition

Caroline is a professionally trained coach with commercial experience across operations, organisational growth, marketing, creative businesses and property management. She is also studying psychology with the Open University. Her work helps founders clarify what is driving change, examine credible options, test assumptions and move towards a personally and commercially coherent direction.

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