

IS YOUR BUSINESS READY TO RUN WITHOUT YOU?

ACCORDING TO BAMBOO HR, 54% OF ORGANIZATIONS TAKE A MOSTLY INFORMAL APPROACH TO PLANNING FOR THE FUTURE, AND THE MAJORITY DON'T BELIEVE THEIR SUCCESSION PLAN IS EFFECTIVE.

PLAN AHEAD

ATA ES CAN HELP YOU WITH THIS PROCESS.

SCHEDULE A DISCOVERY CALL WITH ATAES.
731-885-4810

CREATE A LEADERSHIP SUCCESSION PLAN

A SUCCESSION PLAN HELPS BUSINESSES IDENTIFY FUTURE LEADERS TO CARRY ON THE VISION AND LEGACY OF CURRENT LEADERSHIP WITHIN THE ORGANIZATION.

DO YOU HAVE AN UNDERSTANDING OF?

COMPANY'S VISION

DO YOU HAVE A VISION, AND CAN YOU COMMUNICATE IT TO YOUR EMPLOYEES? IF NOT, IT MIGHT BE TIME FOR A STRATEGIC PLANNING SESSION.

[LEARN MORE HERE](#)

DEFINING HUMAN CAPITAL ROLE

DETERMINE STRATEGIC, CORE, SUPPORTING AND MISALIGNED ROLES.

[LEARN MORE HERE](#)

READY TO LEARN MORE?

NO

CONSIDER THIS:

CONSIDERING SELLING?

NOT YET

YES

FIRST, ASSESS YOUR BUSINESS.

FORECASTING IS VALUABLE TO BUSINESSES BECAUSE IT GIVES THE ABILITY TO MAKE INFORMED BUSINESS DECISIONS AND DEVELOP DATA-DRIVEN STRATEGIES

[ATACPA.NET/ BUSINESS-VALUATION-SERVICES](https://atacpa.net/business-valuation-services)

EXTERNALLY

- GREATER POTENTIAL FOR LARGER COMPENSATION
- QUICK TIMELINE AS COMPARED TO HAVING TO PREPARE A FAMILY MEMBER OR KEY EMPLOYEE
- AVOID THE TURMOIL OF CHOOSING WHO WILL RUN YOUR BUSINESS

INTERNALLY

- KEY EMPLOYEES ALREADY FAMILIAR WITH BUSINESS (LEGACY, VISION, CLIENTS, OTHER EMPLOYEES)
- YOU CAN "GROOM" A YOUNG LEADER TO BE YOUR SUCCESSOR
- GRADUAL EXIT FOR YOU/ABILITY TO STAY INVOLVED WITH THE COMPANY IN SOME WAY

FAMILY

- REPUTATION CAN STAY INTACT
- YOU CAN "GROOM" A FAMILY MEMBER TO BE YOUR SUCCESSOR FROM EARLY ON
- GIFT YOUR BUSINESS FOR SOME TAX BREAKS