



NAME:	Cosmo Spacely
COMPANY:	Spacely Sprockets
DATE:	7/22/2017
REVISION:	0

## THE EXITMAP® MANAGEMENT SUCCESSION WORKSHEET

This worksheet should be used with your trusted advisor. As part of your transition road map, you need to anticipate a planned transfer of the management duties that you still perform as the owner.

List the key employees in your company that currently handle management duties or are expected to do so in the future:

1	Cosmo Spacely - President	5	Rollo Tomassi - Sales Manager	9	Brad Johnson - Shop Foreman
2	Angela Spacely-Kane - Vice President	6	Mario Hsieng - Production Manager	10	Sally Mustang - Dir. of HR
3	George Jetson - Controller	7	Mary Marie-Marisol - Bookkeeper	11	N/A
4	Elroy Jetson - Chief Engineer	8	Chuck Itall - Purchasing Manager	12	

Using the tables below, select the name of the person currently responsible for each of the duties listed and then select the successor expected to assume them by the end of a transition. If a specific duty is not applicable to your business, please select N/A from the Status field dropdown. If it is applicable but not currently utilized or assigned, leave the "Current" field blank and assign it to a Successor (you can select **TBD** if you don't know). If you are unsure at this time who, if anyone, will assume a duty, leave the "Successor" field blank.

In the Status field next to the Successor's name, please enter their current ability to handle the job:

- 1 – Already assumes full responsibility in this area
- 2 – Can perform the function with assistance
- 3 – Untrained with little or no experience in this area
- N/A – Not applicable

DAILY SUPERVISION	CURRENT	SUCCESSOR	STATUS
Sales	Rollo Tomassi - Sales Manager	TBD	3
Accounting	George Jetson - Controller	TBD	3
Production	Mario Hsieng - Production Manager	Brad Johnson - Shop Foreman	2
Marketing	Angela Spacely-Kane - Vice President	TBD	3
Research and Development	Cosmo Spacely - President	Elroy Jetson - Chief Engineer	1
Administration	Cosmo Spacely - President	Angela Spacely-Kane - Vice President	1
Information Technology	Elroy Jetson - Chief Engineer	TBD	3
Other:			

PRODUCTION	CURRENT	SUCCESSOR	STATUS
Quality Control	Mario Hsieng - Production Manager	Brad Johnson - Shop Foreman	3
Production Scheduling	Mario Hsieng - Production Manager	TBD	3
Manufacturing	Mario Hsieng - Production Manager	Brad Johnson - Shop Foreman	2
Product Delivery	Angela Spacely-Kane - Vice President	Mario Hsieng - Production Manager	2
Logistics	Angela Spacely-Kane - Vice President	Mario Hsieng - Production Manager	1
Dispatch and Delivery	Mario Hsieng - Production Manager	Brad Johnson - Shop Foreman	2
Procedures	Mario Hsieng - Production Manager	TBD	3
Other:			

PURCHASING	CURRENT	SUCCESSOR	STATUS
Inventory/Raw Materials	Chuck Itall - Purchasing Manager	TBD	3
Price Negotiations	Cosmo Spacely - President	Chuck Itall - Purchasing Manager	3
Vendors			
Selection	Cosmo Spacely - President	Chuck Itall - Purchasing Manager	2
Relations	Chuck Itall - Purchasing Manager	Angela Spacely-Kane - Vice President	1
Contracts	Cosmo Spacely - President	Angela Spacely-Kane - Vice President	2
Capital Equipment	Cosmo Spacely - President	Angela Spacely-Kane - Vice President	2
Supplies	Chuck Itall - Purchasing Manager	TBD	1
Other:			



This sample is provided for demonstration purposes only.

Some pages have been excluded in order to protect our intellectual property.