WOODARD®

Practice Advancement Program

Transition Strategies
Practice Readiness Execution Workshop

Course Description

This workshop moves owners from understanding to execution. Over four weeks, a small cohort of members assesses every dimension of practice readiness with the Practice Readiness Tool, surfaces the specific gaps standing between their practice and a smooth succession, and leaves with a prioritized, accountable 90-day action plan to close them.

Syllabus

Section One: Establishing Your Readiness Baseline

- Practice Readiness Foundations
- Your Readiness Baseline: The Practice Readiness Tool

Section Two: Financial and Operational Readiness

- Financial Readiness for Succession
- Operational Readiness for Succession

Section Three: Cultural, Strategic, and Team Readiness

- Cultural Readiness: Culture You Can Prove
- Strategic Positioning and the Niche Test
- Team and Leadership Continuity

Section Four: From Gaps to Strategy

- Deal Structures That Reward Readiness
- Your Transition Team and Advisor Timing
- Readiness Through the Buyer's Eyes
- Building Your Readiness Strategy

*PREREQUISITES: This workshop is available to members at the Advantage and Premium Levels who have completed the course titled 'Transition Strategies: Getting Your Practice Ready.'