WOODARD®

Practice Advancement Program

Transition Strategies: Buyer Profile Execution Workshop

Course Description

Whether you're preparing for an immediate sale or future exit, you'd like to find a buyer who meets all your needs—but in reality, compromises are often required. This workshop guides participants through understanding buyer motivations and aligning practice fit, identifying negotiable deal terms and red flags, and developing key buyer profiles. Participants will explore real-world and digital avenues for locating buyers, define ideal timelines, and refine buyer profiles to align potential buyers with your succession goals.

Syllabus

Session One – Understanding Accounting Practice Buyers

- Understanding Motivations
- Identifying Characteristics
- Aligning Practice Fit

Session Two – Defining Negotiable and Non-negotiable Elements

- Identifying Deal Breakers
- Spotting Red Flags
- Defining the Negotiable Parameters

Session Three – Exploring Viable Succession Scenarios

- Building Potential Buyer Profiles
- The Vetting Process
- Starting the Conversation with Potential Buyers

Session Four – Profile Refinement and Timeline Strategy

- Locating Buyers
    - Exploring real world environments
    - Navigating digital platforms
- Ideating an Optimum Timeline
- Refining the Profiles

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 7-week Succession and Exit Strategies Part 1 Course.