

SEHG IN-PERSON WORKSHOP SERIES

Business Succession Planning

Instructor-Led Workshop · Facilitator Kit

Complete facilitator kit for delivering the SEHG Business Succession Planning workshop on site — training manual, instructor guide, slides, icebreakers, quick-reference sheets, and completion certificates.

WHAT'S IN THIS KIT

01 · Training Manual (participant workbook)

02 · Instructor Guide (facilitator script & timings)

03 · Icebreakers & Activities

04 · Presentation Slides

05 · Quick Reference Sheets (takeaway)

06 · Certificate of Completion

SEHG-HR-5874 · IN-PERSON WORKSHOP KIT

synergyeducationholdings.com

Business Succession Planning

SYNERGY EDUCATION HOLDINGS GROUP · IN-PERSON WORKSHOP SERIES

About This Workshop

The loss of valuable leadership can cripple a company. Business succession planning is essentially preparing successors to take on vital leadership roles when the need arises. It is essential to the long-term survival of a company. Every company should have a form of succession planning in its portfolio, as it is not the expected absences that can cripple a company, but the unexpected ones.

Whether it is preparing someone to take over a position of leadership in a corporation, or the sole proprietor of a small business, Business Succession Planning will teach you the difference between succession planning and mere replacement planning. How you prepare people to take on the responsibilities of leadership so that the company thrives in the transition, is just as important as picking the right person for the job.

Workshop Objectives

- Define business succession planning and its role in your company.
- Lay the groundwork to develop a succession plan.
- The importance of mentorship.
- Define and use a SWOT analysis to set goals.
- Create a plan, assign roles, and execute the plan.
- Communicate to develop support and manage change.
- Anticipate obstacles, and evaluate and adapt goals and plans.
- Characterize success.

Format & Delivery

- Instructor-led session, delivered on site or SEHG-hosted
- Includes participant workbooks, activities, and takeaway reference sheets
- Every participant receives an SEHG Certificate of Completion
- Pairs with the SEHG online Business Succession Planning course for pre-work and reinforcement

Preparing & Delivering the Workshop

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Before the Workshop

- Review the Instructor Guide end to end — timings, scripts, and activity setup
- Print one Training Manual and one Quick Reference Sheet per participant
- Load the Presentation Slides and test the projector, audio, and clicker
- Choose 1–2 icebreakers from the kit that fit the group size and room
- Prepare blank Certificates of Completion for sign-off at close

Checking Out the Venue

- Adequate seating with clear sight lines to the facilitator and screen
- Projector compatibility, cables, and extension cords tested in advance
- Lighting that lets participants see you, their notes, and the screen
- Space for group activities, plus a table for handouts and materials

Closing the Session

- Recap the workshop objectives and each participant's key takeaway
- Distribute the Quick Reference Sheet as the on-the-job takeaway
- Present the SEHG Certificate of Completion to each participant
- Point participants at the paired SEHG online course for reinforcement

Book this workshop

Contact your SEHG program advisor to schedule this workshop for your team, or add it to any SEHG learning program as the in-person option.

SYNERGY EDUCATION HOLDINGS GROUP

Certificate of Completion

This certificate is proudly presented to

for successfully completing the SEHG in-person workshop

Business Succession Planning

Awarded this ____ day of _____, 20__

Facilitator Name & Title



Synergy Education Holdings Group