The Operator Seat

THE TRANSITION PLAYBOOK

YOUR NAME: ______________________ **COMPANY:** ________________________

This playbook walks through the six steps of a deliberate transition–from defining your future role before you announce anything, to resisting the gravitational pull once your successor is in place.
The goal isn't just a clean exit–it's setting yourself (and your company) up for what comes next.

STEP 1: Define Your Future Role

(Month 1)

You're stepping OUT of something. What are you stepping INTO?

Take time to think and write down your honest answer to the question - "In 12 months, what is my relationship to this company?"

Common options:

- **Strategic Owner/Board Chair:** *Set direction, evaluate leadership, ensure vision alignment. Don't execute.*
- **Available Advisor:** *Accessible for specific challenges but not involved in weekly operations*
- **Active Investor:** *Focused on enterprise value, transaction readiness, and key relationships*

Action item: Write a one-page role definition for yourself in 12 months. Be specific. Ambiguity here will sabotage everything else.

My Future Role:

STEP 2: Audit Your Current Responsibilities

(Month 2)

List everything you currently own. Be exhaustive. Then categorize each item. Print additional copies of the next page as needed.

Category A - Must Stay With You:

- Owner-level decisions (major pivots, M&A, capital structure)
- Board relationships
- Key investor/partner relationships

Category B - Transition to New CEO/President:

- Day-to-day operations
- Team management and development
- Execution of strategy
- Customer/client escalations

Category C - Transition to Functional Leaders:

- Department-specific decisions
- Operational improvements
- Hiring below the executive level

Category D - Systematize (Remove Individual Ownership):

- Recurring decisions that should have documented frameworks
- Approvals that could be automated or eliminated

Current Responsibilities	Category
	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D
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	A / B / C / D
	A / B / C / D
	A / B / C / D
	A / B / C / D

Now that you have everything listed and categorized, calculate how many responsibilities fall under each category:

A: ____________ B: ____________ C: ____________ D: ____________

Reality check: Most founders discover their Category A list is 20% of what they thought. That's the point.

Next Steps:
Now that you've considered your current and future roles within the company, continue on to the next section to define how you'll spend your newfound free time.