Does this business fit you?

Complete your own criteria before assigning yourself the owners' responsibilities.

Case / business / information date

Hours available each week, including evenings and emergencies

Responsibilities you can competently own now

Responsibilities you want to learn, and support you will need

Work you need someone else to cover / non-negotiable limits

Current fit decision and the evidence that could change it

Map one responsibility

Duplicate this page for estimates, urgent calls, scheduling, payroll and other key work.

Task and current person (use role labels where possible)

Time / frequency / ordinary week versus busy week

Decision made, authority needed, and escalation path

Proposed person after closing, capacity and competence

Evidence: records, walkthrough, absence test, role description

Uncovered work / backup / qualification to verify

Status: seller claim / assumption / evidence reviewed / unresolved

Worked example: an estimate

Illustrative worksheet row. These assignments and timings are not Case H facts.

Current task: preparing and approving an estimate

Current person: owner role; exact division of work to verify

Breakdown: visit, scope, labour/material costing, discount approval

After closing: proposed manager, subject to capacity and competence

Evidence: sample job files, pricing rules, observed walkthrough

Check: who approves exceptions, and who reviews job margin?

A useful request for the seller

Please walk us through a recent estimate from first enquiry to collected invoice. Which decisions required an owner, how long did those steps take, and what happened when that owner was unavailable?

Your next request

Specific evidence / responsible person / agreed next step

Coordinate access and employee conversations through the agreed process.

Count the incremental cost

Reconcile the same covered role before subtracting anything again.

Illustrative example

Proposed annual cost for a role:	$120,000
Allowance already deducted for that same role:	$90,000
Additional adjustment:	**$30,000**

These are teaching assumptions, not market salary estimates.

Role / responsibilities covered by the existing allowance

Your supported cost estimate and what is already included

Additional recurring cost, counted once

Separate one-time transition costs and buyer draw assumptions

Keep the source and accounting basis attached. Reconcile with your adviser.

Make the handover measurable

A negotiation checklist, not agreed deal terms or legal drafting.

Responsibilities / seller availability / duration / compensation

Milestones: supervised work, reviewed work, agreed sign-off

Dependencies: people, qualifications, systems, customer introductions

What happens if a milestone is missed? Who decides the next step?

Next action: investigate further, revise the operating plan, or pass

Companion lesson: BuildForReal.com | Original CIM pages are not included.