

Legacy Succession Blueprint

For Families & Teams

Prepare your heirs for more than money.

I. Legacy Mapping Worksheet

Before you transfer responsibility, clarify the *covenant* that governs it.

1. Covenant Core

- What is the *non-negotiable mission* of this business or family enterprise?
- What is the Kingdom “why” behind the work?

Prompt:

“If this business disappeared tomorrow, what would the Kingdom lose?”

2. Legacy Values

Name your top 5 values that must be preserved in any leadership transition:

- _____
- _____
- _____
- _____
- _____

3. Intended Heirs

Who are you raising up as stewards of this mission (not just legal beneficiaries)?

- Family members
 - Spiritual sons/daughters
 - Strategic successors
-

II. Succession Readiness Assessment

Evaluate potential heirs across **four domains of readiness**:

Domain	Key Questions	Score (1–5)
Spiritual Maturity	Are they rooted in identity, integrity, and obedience?	
Leadership Experience	Have they faced pressure, made decisions, built teams?	
Financial Wisdom	Do they steward resources with discipline and generosity?	
Ownership Mindset	Do they see this as a calling, not just an inheritance?	

Use this grid to guide development — not disqualify someone. It shows where to invest time and mentorship.

III. 3-Phase Succession Roadmap

Phase 1 – Exposure

“Let them see the weight before they carry it.”

- Invite them into strategy meetings, budget reviews, and tough conversations.
- Encourage questions, but don’t offload responsibility yet.
- Practice vulnerability: share both victories and regrets.

Milestone: They understand the “why” behind your decisions.

Phase 2 – Engagement

“Let them hold the weight with supervision.”

- Assign them leadership of a small initiative or team.
- Coach, debrief, and review with honest feedback.
- Begin transitioning client or team relationships gradually.

Milestone: They can lead without you stepping in.

Phase 3 – Empowerment

“Commission them publicly. Release them privately.”

- Formalize authority (title, equity, operational control).

- Hold a commissioning moment — spiritual and relational.
- Step back without disappearing — become their *advocate*, not their *anchor*.

Milestone: Others follow their leadership on the strength of their *identity*, not your endorsement.

IV. Family or Team Covenant Template

Use this as a guide to shape your own shared agreement:

Family/Team Covenant

This is who we are and how we lead.

We, as a family/team, commit to:

- Upholding the values of _____.
- Pursuing our calling to _____.
- Walking in integrity, accountability, and humility.
- Investing in people over profit.
- Submitting our plans to the Lordship of Jesus Christ.

We agree to speak the truth in love, honor one another's unique gifts, and steward this work for **multiplication, not just maintenance**.

Signed:

Date: _____

V. Regular Succession Review Rhythm

Set intentional rhythms for continuity and clarity:

- **Quarterly Legacy Check-Ins** – Share stories, revisit the “why,” evaluate growth.
- **Annual Leadership Forecast** – Review future roles, development plans, and potential gaps.

- **Prayer & Discernment Retreat** – Seek God’s direction together.

Succession is not a single moment. It’s a lifelong rhythm of leadership formation.

Closing Charge

Don’t let your succession plan be a set of folders in a drawer.

Let it be a fire that *shapes, refines, and launches* the next generation with faith, wisdom, and clarity.

This is how legacy multiplies.
