90-day ownership transition plan

Agree who can make each decision during the ownership handoff and establish the evidence that ends the seller’s involvement.

How to use this file

1. Write both names beside every responsibility you transfer.
2. Set the first escalation window with the seller, dispatcher and service manager before close.
3. At each handoff, record the open exceptions and the person with authority to fix them.

Shop or transaction _____

Prepared by _____

Period and cutoff date _____

> Illustrative outline — not legal advice; have your attorney draft final documents.

Before closing and day one

□ Put signatory authority, bank access and vendor purchasing limits on a dated transfer schedule.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Pair the incoming manager with your dispatcher for an actual on-call handoff and record the escalation path.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Agree on the order and owner of employee, landlord, lender and key account announcements.

Owner and target date _____

Evidence or exception _____

Next action _____

Weeks one through four

□ Shadow the seller on estimate exceptions and price approvals. Write down approval thresholds and backup owners.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Match service-plan balances to visits scheduled after close and resolve disputed customer entitlements.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Inventory passwords through an approved secure handoff. Confirm access separately for dispatch, phones and fleet telematics.

Owner and target date _____

Evidence or exception _____

Next action _____

Days 31 through 90

□ Have the new manager run payroll review and vendor ordering without the seller. Log exceptions.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Call key commercial clients together. Record renewal contacts, contract dates and warranty promises.

Owner and target date _____

Evidence or exception _____

Next action _____

□ Close transition tasks with sign-off, unresolved issues, document location and the scheduled end of seller availability.

Owner and target date _____

Evidence or exception _____

Next action _____