SUCCESSOR COACH

Successor Coach Development Plan

PREPARED FOR

Michael Reyes

COMPANY

Hartwell Grading & Paving

TRANSITION WINDOW

September 2026 to February 2028 · 18 months

SUCCEEDING

Ray Hartwell

GENERATED

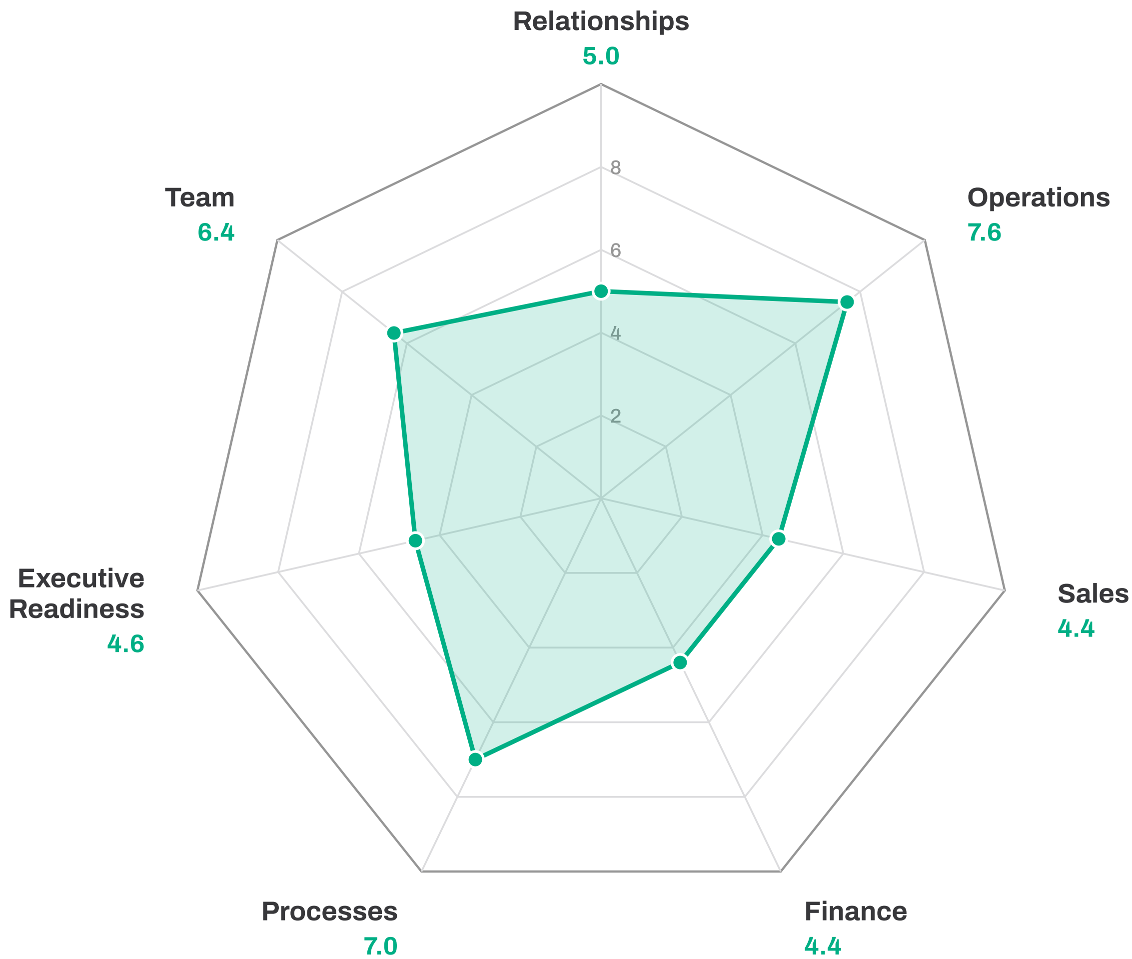
November 15, 2026

Version 1 · generated November 15, 2026
Prepared with David Delk · Successor Coach, a brand of Delk Consulting.

PART ONE

Where you stand

Your readiness across the seven areas, the two that need the most work, and what you've committed to doing about it.



Operations	7.6	DEVELOP
Processes	7.0	DEVELOP
Team	6.4	DEVELOP

Relationships	5.0	DEVELOP
Executive Readiness	4.6	PRIORITY GAP
Sales	4.4	PRIORITY GAP
Finance	4.4	PRIORITY GAP

42	42	0	18	19%
ACTIONS COMMITTED	DATED IN THE PLAN	HELD IN THE BACKLOG	MONTHS TO THE TRANSITION	COMPLETE SO FAR

Michael Reyes is working toward a transition in February 2028, 18 months out. The plan commits to 42 actions, 42 of them dated and 0 held in the backlog. The two areas needing most work are Finance and Sales.

About four a month. Four actions a month is a realistic load alongside a full-time job. Over 18 months that's about 72, and 90 if you push. The plan schedules four and flags a month holding more. Arranged by date, not by area. You chose when each action happens, so the order is yours, and it runs across all seven areas.

PART TWO

The plan, area by area

What you answered, what it produced, and the questions where Ray added something you had missed.

Relationships

17 ACTIONS

WRITE IT DOWN

Name the 5 to 10 external relationships this business most depends on — customers, clients, partners, referrers, lenders. For each one, rate the relationship between that person and the current leader, and the relationship between that person and you.

NAME	HOW WE KNOW THEM	WITH RAY	WITH ME	GAP
First Palmetto Bank	Line of credit and the equipment notes	9	2	7
Ellison Bonding & Surety	Our surety agent; eleven years with Ray	9	2	7
Carolina DOT — District 3	Public bid work; Ray knows the engineer	9	3	6
Ridgeway Commercial Builders	General contractor, repeat sitework	9	5	4
Sutter & Vine Development	Developer; we grade their subdivisions	8	4	4
Greer Municipal Utilities	Utility work under an annual contract	8	4	4
Trailhead Industrial Park	Owner's rep on a multi-year build-out	7	6	1
McKinnon Ready Mix	Concrete supplier; I place the orders	8	7	1
Anderson County Schools	Sitework on school projects, bid job by job	6	5	1

WHAT RAY ADDED

Ray said the Ellison bonding relationship is not a relationship with the company, it is a relationship with him, and it took eleven years to build. He wants to walk me in personally this quarter rather than after the transition. He also said the DOT district engineer is the single relationship most likely to be quietly lost, because nobody outside Ray has ever had a reason to call him.

> *When the current leader rates a relationship 9 and you rate it 3, the person who is leaving carries all of it. The relationship is strong, but you have no part in it yet, and usually nobody notices that until the leader is gone. The wider the gap, the sooner you need to start on it, which is why the summary is sorted by gap.*

~~Ask Ray to introduce me to First Palmetto Bank and hand the relationship over across three meetings~~

September 6, 2026 **With Ray Hartwell** DONE

First Palmetto Bank · transfer gap of 7 · rated 2

~~Ask Ray to introduce me to Ellison Bonding & Surety and hand the relationship over across three meetings~~

October 6, 2026 **With Ray Hartwell** DONE

Ellison Bonding & Surety · transfer gap of 7 · rated 2

Ask Ray to introduce me to Carolina DOT — District 3 and hand the relationship over across three meetings

November 6, 2026 **With Ray Hartwell** IN PROGRESS

Carolina DOT — District 3 · transfer gap of 6 · rated 3

Schedule a standing quarterly lunch with Ridgeway Commercial Builders

January 6, 2027 **With Ray Hartwell** NOT STARTED

Ridgeway Commercial Builders · transfer gap of 4 · rated 5

Take ownership of the next renewal or negotiation with this account

February 6, 2027 **With Ray Hartwell** NOT STARTED

Sutter & Vine Development · transfer gap of 4 · rated 4

Take ownership of the next renewal or negotiation with this account

March 6, 2027 **With Ray Hartwell** NOT STARTED

Greer Municipal Utilities · transfer gap of 4 · rated 4

Schedule a standing quarterly lunch with Trailhead Industrial Park

April 6, 2027 **With Ray Hartwell** NOT STARTED

Trailhead Industrial Park · rated 6

Schedule a standing quarterly lunch with Anderson County Schools

May 6, 2027 **With Ray Hartwell** NOT STARTED

Anderson County Schools · rated 5

Key people outside the part of the business I run know me and would follow my lead.

4 /10

Set monthly one-to-ones with each person who runs a part of the business I don't

November 18, 2026 IN PROGRESS

rated 4

I have at least one experienced outside advisor or mentor who has led at the level I'm stepping into.

NO

~~Identify three candidates and ask one of them by September 24, 2026~~

September 24, 2026 DONE

answered no

I have my own relationships with our bank or lenders and our key professional advisors — attorney, CPA.

6 /10

~~Attend the next bank meeting and lead one agenda item~~

October 19, 2026 DONE

rated 6

I know our top competitors' leaders and their companies — or I have peers who do.

4 /10

~~Attend the next industry event where our competitors will be, before October 25, 2026~~

October 25, 2026 DONE

rated 4

I'm known in our industry — associations, conferences, trade groups — as a coming leader of this company.

5 /10

~~Join our primary trade association and attend its next event by September 12, 2026~~

September 12, 2026 DONE

rated 5

CHECK IT WITH RAY

Our most important customers or clients know a transition is coming and are comfortable with me.

NO

> *When to tell customers is a strategy decision, so we've flagged it for the review rather than answering it here.*

Agree the disclosure sequence and timing with Ray before July 6, 2027

July 6, 2027 With Ray Hartwell NOT STARTED

answered no

If the current leader disappeared tomorrow, our key external relationships would carry over to me without damage.

4 /10

Take the lead on the next three meetings with our largest accounts, with Ray present but quiet

June 6, 2027 With Ray Hartwell NOT STARTED

rated 4

WRITE IT DOWN

Which internal relationships are strained or untested?

WHO	WHAT MAKES IT STRAINED OR UNTESTED
Terry Poole	Never worked together directly, and they have been here longer

Have a direct conversation with Terry Poole before March 25, 2027

March 25, 2027 NOT STARTED

Terry Poole · listed here

WRITE IT DOWN

I have relationships with the political, civic, and community figures that matter to our business. List those key individuals here.

3 /10

> Chamber and the county council chair, both through the current leader rather than through me.

Ask Ray which civic and community relationships actually matter to this business, and why, before November 12, 2026

November 12, 2026 IN PROGRESS

rated 3

Operations

9 ACTIONS

WRITE IT DOWN

List every major function or department in this business, and for each one rate your firsthand understanding — have you actually worked in it, or only heard about it?

FUNCTION OR DEPARTMENT	MY FIRSTHAND UNDERSTANDING
Estimating and bidding	4
Grading crews	9
Paving crews	8
Equipment and shop	7
Office, payroll, and AP	3
Safety and compliance	6

> *Most successors know one or two functions well and the rest only a little. In the functions they don't know, their own staff can end up managing them.*

Spend three days embedded in Estimating and bidding before November 24, 2026

November 24, 2026 IN PROGRESS

Estimating and bidding · rated 4

Ask the leader of Office, payroll, and AP to walk me through their week, their metrics, and their headaches

December 12, 2026 NOT STARTED

Office, payroll, and AP · rated 3

Sit in on the Safety and compliance team meeting monthly, starting December 19, 2026

December 19, 2026 NOT STARTED

Safety and compliance · rated 6

CHECK IT WITH RAY

List the parts of our operations you believe produce the highest margins, and the parts you believe consume resources without returning much.

WHICH PART OF THE OPERATION	WHICH IS IT
Grading crews	Produces the highest margin
Bid invitation to submitted proposal	Consumes resources without returning much
Estimating and bidding	Produces the highest margin
Equipment and shop	Consumes resources without returning much

Review my list with Ray and add what I missed, before December 6, 2027

December 6, 2027 With Ray Hartwell NOT STARTED

needs the conversation

CHECK IT WITH RAY

List the parts of this business you believe are most fragile, and separately, the parts you believe are most resilient.

WHAT	FRAGILE OR RESILIENT
Bonding capacity, which rests on Ray	Fragile
One ready-mix supplier	Fragile
Terry does all the estimating	Fragile
Grading crews	Resilient
Equipment fleet and the shop	Resilient

WHAT RAY ADDED

He named two I missed and one I had backwards. Missed: our haul-truck drivers are all within four years of retirement, and the county inspector who likes us is retiring in the spring. Backwards: I called the equipment fleet resilient. Ray says it is the most fragile thing we own because three machines are doing the work of five and one bad month of downtime puts us behind on two DOT jobs at once.

> *Most businesses don't talk about what is fragile until something breaks, so a successor usually has big blind spots here. What the current leader adds to this list is often the most useful part of the plan.*

Review my fragility list with Ray before January 6, 2028 and add everything I missed

January 6, 2028 With Ray Hartwell NOT STARTED

needs the conversation

I could explain how we deliver our product or service end to end — including the steps I've never personally performed.

7 /10

CHECK IT WITH RAY

State our real capacity limit in concrete terms — units, hours, clients, jobs, revenue, whatever governs — and name what would have to change to raise it.

> Our real limit is crew and machine hours in the peak months. Raising it means hiring ahead of the work, which we have never done.

Confirm my capacity numbers with Ray before September 6, 2027

September 6, 2027 With Ray Hartwell NOT STARTED

needs the conversation

CHECK IT WITH RAY

List the suppliers, vendors, or partners we could not easily replace, and why each one is hard to replace.

SUPPLIER, VENDOR, OR PARTNER	WHY THEY'RE HARD TO REPLACE
McKinnon Ready Mix	Only supplier inside a 40-minute haul
Ellison Bonding & Surety	Our bonding capacity is their relationship with Ray
Upstate Equipment Rental	Holds our shortfall in peak season

Review my list with Ray and add what I missed, before October 6, 2027

October 6, 2027 With Ray Hartwell NOT STARTED

needs the conversation

I know the numbers this business is actually run by, and I could tell whether this month was good or bad without being told.

7 /10

I have made a real operational decision with consequences — and lived with the result.

YES

> Yes — and I could point to a specific example if asked.

I understand how our technology, software, systems, and equipment support — or limit — our operations, and what the next needed investment is.

9 /10

CHECK IT WITH RAY

Where will AI most change how this business operates, sells, and competes over the next five years — where does it threaten us, and where could it give us an edge? Name what we are actually doing about it today.

> Estimating first — takeoffs and bid leveling are exactly the work it is good at, and whoever gets there first in this market bids more work with the same people. We are doing nothing today, and I do not know what our competitors are doing either.

> *The answer matters less than whether you and the current leader see the same future. If the answer is "it won't affect us," test that before you accept it.*

Pilot one AI use inside a core process and report the result to the leadership team by November 6, 2027

November 6, 2027 With Ray Hartwell NOT STARTED

needs the conversation

CHECK IT WITH RAY

List every recurring decision, approval, or relationship that still runs through the current leader personally. For each one, mark when it moves.

WHAT RUNS THROUGH THEM	WHEN IT MOVES
Final pricing on anything unusual	Transfers at the transition
The Carolina DOT — District 3 relationship	Transfers to me before the transition
Bank and lender conversations	Transfers at the transition
Hiring above a certain level	Transfers to me before the transition
Whatever Ray decides to keep	Stays with them

WHAT RAY ADDED

Ray added six things I had not thought of: he signs every surety renewal personally, he approves any change order over $25k without telling anyone, he calls the DOT district engineer roughly monthly just to keep the relationship warm, he sets the paving crews' overtime cap by feel each June, he negotiates the ready-mix price every January, and he personally decides which jobs we walk away from. Four of those he had never mentioned to me in nine years.

> *Once the current leader has checked this list, it is the center of the transition plan. Build it early and go back over it every quarter.*

Build this list and review it with Ray before December 6, 2026

December 6, 2026 With Ray Hartwell NOT STARTED

needs the conversation

Finance

7 ACTIONS

WRITE IT DOWN

Name the 5 to 8 numbers you personally watch to know whether this business is healthy — and enter the approximate current value of each, from memory.

THE NUMBER	APPROXIMATE CURRENT VALUE
Backlog, in months of work	about 7
Gross margin on grading work	22%
Equipment utilization	no idea
Days sales outstanding	—
Labor as a share of revenue	roughly a third

> *A successor who can't state the key numbers from memory is managing by stories rather than numbers. This is usually the fastest gap to close, and closing it builds confidence quickly.*

~~Build a one-page dashboard of my key numbers and review it weekly, starting October 12, 2026~~

October 12, 2026 DONE

1 left blank

I could walk a banker or investor through our income statement, balance sheet, and cash flow statement, and explain what they say about the health of this business.

3 /10

~~Have our CPA teach me our three statements line by line, three sessions before September 18, 2026~~

September 18, 2026 DONE

rated 3

I know our gross margin by product line, service line, customer segment, or engagement type — and which ones actually make money.

4 /10

Build a margin-by-line analysis with our finance lead by April 12, 2027

April 12, 2027 NOT STARTED

rated 4

I understand our cash conversion cycle — how long it takes from spending a dollar to collecting it.

5 /10

Map our cash cycle end to end by April 18, 2027

April 18, 2027 NOT STARTED

rated 5

CHECK IT WITH RAY

List, in order, the levers you would pull if cash got tight — and the early warning signs you would watch for.

THE LEVER, OR THE WARNING SIGN	WHICH IS IT
Slow down discretionary spending	A lever I would pull
Chase receivables harder	A lever I would pull
Talk to the bank	A lever I would pull
Receivables ageing past 60 days	An early warning sign
Payroll feeling tight	An early warning sign

WHAT RAY ADDED

His order was almost the reverse of mine. He stops equipment purchases first, then slows the shop, then talks to the bank before he needs to, and only then touches crews. I had crews second. He said letting a crew go in a tight month costs you the whole next season, because the good ones do not come back.

> *Owners who have survived a cash crisis carry a hierarchy of moves in their head that no document contains. Get it written down while they're still here.*

Write our cash contingency playbook — what gets cut, in what order — with Ray by February 6, 2028

February 6, 2028 With Ray Hartwell NOT STARTED

needs the conversation

I know the terms and covenants of our debt or line of credit — including what would trigger a default or a call.

NO

Read every loan agreement and summarize the covenants in one page by December 25, 2026

December 25, 2026 NOT STARTED

answered no

I understand how our pricing was actually set, and how much pricing power we really have.

5 /10

> *Pricing is where inherited assumptions cost the most — many founders priced by instinct years ago and never revisited it.*

Analyze win/loss and discount patterns across our last 20 proposals or quotes

January 12, 2027 NOT STARTED

rated 5

Processes

9 ACTIONS

WRITE IT DOWN

List the 5 to 10 processes that produce most of the value in this business — for example, inbound lead to sales proposal. For each one: is it documented, and how well do you understand it?

PROCESS	DOCUMENTED?	MY UNDERSTANDING OF IT
Bid invitation to submitted proposal	No	4
Awarded job to mobilised crew	Yes	9
Daily production reporting	Yes	8
Change order approval	No	5
Monthly pay application and retainage	No	3
Equipment maintenance scheduling	Yes	7
Subcontractor onboarding and insurance	No	5
Job closeout and punch list	Yes	8

Document how we do Bid invitation to submitted proposal, with the person who runs it, by January 19, 2027

January 19, 2027 NOT STARTED

Bid invitation to submitted proposal · rated 4 · not documented

Spend a full day inside Change order approval myself, before January 25, 2027

January 25, 2027 NOT STARTED

Change order approval · rated 5 · not documented

Have the process owner teach Monthly pay application and retainage to me, and then teach it back to them

February 11, 2027 NOT STARTED

Monthly pay application and retainage · rated 3 · not documented

Document how we do Subcontractor onboarding and insurance, with the person who runs it, by February 17, 2027

February 17, 2027 NOT STARTED

Subcontractor onboarding and insurance · rated 5 · not documented

CHECK IT WITH RAY

For our three most important processes, write down the judgment calls and tradeoffs inside each one — the decisions that require experience, not just the steps.

PROCESS	JUDGMENT CALLS	TRADEOFFS
Bid invitation to submitted proposal	Knowing when to walk away from one. That read lives entirely with Ray.	Speed now against a relationship we may need next year.
Awarded job to mobilised crew	Sequencing under pressure — what moves first when everything is due at once. I can do this one.	Finishing one job late against starting three on time.
Daily production reporting	I am guessing. I know the steps and not the calls, which is the point of this row.	Not yet known — this is what the conversation with Ray is for.

> *Documentation records the steps but almost never the judgment, and the judgment leaves when the current leader does. What the current leader adds here is the most valuable thing you will inherit.*

Review what I wrote with each process owner before April 24, 2027 and capture what they add

April 24, 2027 With Ray Hartwell NOT STARTED

needs the conversation

WRITE IT DOWN

Which of our critical processes, if any, are overly dependent on a single person? List them.

PROCESS	WHO IT DEPENDS ON
McKinnon Ready Mix	Only supplier inside a 40-minute haul
Ellison Bonding & Surety	Our bonding capacity is their relationship with Ray

Cross-train a second person on McKinnon Ready Mix by February 22, 2027

February 22, 2027 NOT STARTED

McKinnon Ready Mix · listed here

Have the person who runs it document their decision rules, not just their tasks

March 12, 2027 NOT STARTED

Ellison Bonding & Surety · listed here

If the current leader were unavailable for 60 days, every critical process would keep running without them.

NO

> *This is the best stress test you can run before a transition, and it costs nothing.*

Run a deliberate two-week test where Ray stays out of one critical process

August 6, 2027 With Ray Hartwell NOT STARTED

answered no

I know our core systems and software, what each one does, who administers it, and where the data lives.

7 /10

I have personally improved or rebuilt one of our core processes, and I can point to the result.

8 /10

CHECK IT WITH RAY

Name where you believe each of our top three processes would break if volume doubled, and what the current bottleneck is.

PROCESS	WHERE IT BREAKS, AND THE BOTTLENECK
Bid invitation to submitted proposal	It would break immediately; nobody owns it
Awarded job to mobilised crew	People, not systems — we would need another crew or another reviewer
Daily production reporting	People, not systems — we would need another crew or another reviewer

Run a 2x capacity analysis with the team by March 19, 2027 and compare with my predictions

March 19, 2027 With Ray Hartwell NOT STARTED

needs the conversation

We measure quality and error rates in our critical processes, and I know what those measurements currently are.

7 /10

I know where our undocumented know-how lives — the things that are only in people's heads.

YES

I know which processes are compliance-, safety-, or license-critical, and our current standing in each.

7 /10

> *A compliance failure is the fastest way for a new leader to lose credibility. Know where each one stands before you take over.*

I could personally onboard and train a new employee into our most important processes.

8 /10

PART THREE

What Ray added

This is the most valuable part of this document. These are the things the person you're succeeding named that you had not — knowledge that is not written down anywhere and leaves with them.

OPERATIONS

List every recurring decision, approval, or relationship that still runs through the current leader personally. For each one, mark when it moves.

WHAT I HAD

WHAT RUNS THROUGH THEM	WHEN IT MOVES
Final pricing on anything unusual	Transfers at the transition
The Carolina DOT — District 3 relationship	Transfers to me before the transition
Bank and lender conversations	Transfers at the transition
Hiring above a certain level	Transfers to me before the transition
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OPERATIONS

List the parts of this business you believe are most fragile, and separately, the parts you believe are most resilient.

WHAT I HAD

WHAT	FRAGILE OR RESILIENT
Bonding capacity, which rests on Ray	Fragile
One ready-mix supplier	Fragile
Terry does all the estimating	Fragile
Grading crews	Resilient
Equipment fleet and the shop	Resilient

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RELATIONSHIPS

Name the 5 to 10 external relationships this business most depends on — customers, clients, partners, referrers, lenders. For each one, rate the relationship between that person and the current leader, and the relationship between that person and you.

WHAT I HAD

NAME	HOW WE KNOW THEM	WITH RAY	WITH ME	GAP
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Trailhead Industrial Park	Owner's rep on a multi-year build-out	7	6	1
McKinnon Ready Mix	Concrete supplier; I place the orders	8	7	1

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NAME	HOW WE KNOW THEM	WITH RAY	WITH ME	GAP
Anderson County Schools	Sitework on school projects, bid job by job	6	5	**1**

FINANCE

List, in order, the levers you would pull if cash got tight — and the early warning signs you would watch for.

WHAT I HAD

THE LEVER, OR THE WARNING SIGN	WHICH IS IT
Slow down discretionary spending	A lever I would pull
Chase receivables harder	A lever I would pull
Talk to the bank	A lever I would pull
Receivables ageing past 60 days	An early warning sign
Payroll feeling tight	An early warning sign

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PART FOUR

The plan, by date

This lays out the plan month by month, from September 2026 to February 2028. The dates are the ones you chose, so a month may hold two Finance actions and one Team action.

	SEP 2026	OCT	NOV	DEC	JAN 2027	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN 2028	FEB
Relationships	●●●	●●●	○○○		○	○	○○	○	○	○	○							
Operations			○	○○○									○	○	○	○	○	
Sales NOT YET																		
Finance	●	●		○	○			○○										○
Processes					○○	○○○	○○	○				○						
Executive Readiness NOT YET																		
Team NOT YET																		
Actions that month	4	4	4	4	4	4	4	4	1	1	1	1	1	1	1	1	1	1

○ still to do ● done One dot is one action. A month holding 5 or more is flagged, and so is an empty one.

Month by month

September 2026

4 ACTIONS

6 ~~Ask Ray to introduce me to First Palmetto Bank and hand the relationship over across three meetings~~
RELATIONSHIPS · WITH RAY HARTWELL

12 ~~Join our primary trade association and attend its next event by September 12, 2026~~
RELATIONSHIPS

18 ~~Have our CPA teach me our three statements line by line, three sessions before September 18, 2026~~
FINANCE

24 ~~Identify three candidates and ask one of them by September 24, 2026~~
RELATIONSHIPS

October 2026

4 ACTIONS

6 ~~Ask Ray to introduce me to Ellison Bonding & Surety and hand the relationship over across three meetings~~
RELATIONSHIPS · WITH RAY HARTWELL

12 ~~Build a one-page dashboard of my key numbers and review it weekly, starting October 12, 2026~~
FINANCE

19 ~~Attend the next bank meeting and lead one agenda item~~
RELATIONSHIPS

25 ~~Attend the next industry event where our competitors will be, before October 25, 2026~~
RELATIONSHIPS

November 2026

4 ACTIONS

6 Ask Ray to introduce me to Carolina DOT — District 3 and hand the relationship over across three meetings
RELATIONSHIPS · WITH RAY HARTWELL

12 Ask Ray which civic and community relationships actually matter to this business, and why, before November 12, 2026
RELATIONSHIPS

18 Set monthly one-to-ones with each person who runs a part of the business I don't
RELATIONSHIPS

24 Spend three days embedded in Estimating and bidding before November 24, 2026
OPERATIONS

December 2026

4 ACTIONS

6 Build this list and review it with Ray before December 6, 2026
OPERATIONS · WITH RAY HARTWELL

12 Ask the leader of Office, payroll, and AP to walk me through their week, their metrics, and their headaches
OPERATIONS

19 Sit in on the Safety and compliance team meeting monthly, starting December 19, 2026
OPERATIONS

25 Read every loan agreement and summarize the covenants in one page by December 25, 2026
FINANCE

January 2027

4 ACTIONS

6 Schedule a standing quarterly lunch with Ridgeway Commercial Builders
RELATIONSHIPS · WITH RAY HARTWELL

12 Analyze win/loss and discount patterns across our last 20 proposals or quotes
FINANCE

19 Document how we do Bid invitation to submitted proposal, with the person who runs it, by January 19, 2027
PROCESSES

25 Spend a full day inside Change order approval myself, before January 25, 2027
PROCESSES

February 2027

4 ACTIONS

6 Take ownership of the next renewal or negotiation with this account
RELATIONSHIPS · WITH RAY HARTWELL

11 Have the process owner teach Monthly pay application and retainage to me, and then teach it back to them
PROCESSES

17 Document how we do Subcontractor onboarding and insurance, with the person who runs it, by February 17, 2027
PROCESSES

22 Cross-train a second person on McKinnon Ready Mix by February 22, 2027
PROCESSES

March 2027

4 ACTIONS

6 Take ownership of the next renewal or negotiation with this account
RELATIONSHIPS · WITH RAY HARTWELL

12 Have the person who runs it document their decision rules, not just their tasks
PROCESSES

19 Run a 2x capacity analysis with the team by March 19, 2027 and compare with my predictions
PROCESSES · WITH RAY HARTWELL

25 Have a direct conversation with Terry Poole before March 25, 2027
RELATIONSHIPS

April 2027

4 ACTIONS

6 Schedule a standing quarterly lunch with Trailhead Industrial Park
RELATIONSHIPS · WITH RAY HARTWELL

12 Build a margin-by-line analysis with our finance lead by April 12, 2027
FINANCE

18 Map our cash cycle end to end by April 18, 2027
FINANCE

24 Review what I wrote with each process owner before April 24, 2027 and capture what they add
PROCESSES · WITH RAY HARTWELL

May 2027

1 ACTION

6 Schedule a standing quarterly lunch with Anderson County Schools
RELATIONSHIPS · WITH RAY HARTWELL

June 2027

1 ACTION

6 Take the lead on the next three meetings with our largest accounts, with Ray present but quiet
RELATIONSHIPS · WITH RAY HARTWELL

July 2027

1 ACTION

6 Agree the disclosure sequence and timing with Ray before July 6, 2027
RELATIONSHIPS · WITH RAY HARTWELL

August 2027

1 ACTION

6 Run a deliberate two-week test where Ray stays out of one critical process
PROCESSES · WITH RAY HARTWELL

September 2027

1 ACTION

6 Confirm my capacity numbers with Ray before September 6, 2027
OPERATIONS · WITH RAY HARTWELL

October 2027

1 ACTION

6 Review my list with Ray and add what I missed, before October 6, 2027
OPERATIONS · WITH RAY HARTWELL

November 2027

1 ACTION

6 Pilot one AI use inside a core process and report the result to the leadership team by November 6, 2027
OPERATIONS · WITH RAY HARTWELL

December 2027

1 ACTION

6 Review my list with Ray and add what I missed, before December 6, 2027
OPERATIONS · WITH RAY HARTWELL

January 2028

1 ACTION

6 Review my fragility list with Ray before January 6, 2028 and add everything I missed
OPERATIONS · WITH RAY HARTWELL

February 2028

1 ACTION

6 Write our cash contingency playbook — what gets cut, in what order — with Ray by February 6, 2028
FINANCE · WITH RAY HARTWELL

The next 90 days

This is everything due before February 13, 2027, the part of the plan you'll use most.

November 2026

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

December 2026

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2027

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Set monthly one-to-ones with each person who runs a part of the business I don’t

November 18, 2026 IN PROGRESS

Relationships · Key people outside the part of the business I run know me and would f... · rated 4

Spend three days embedded in Estimating and bidding before November 24, 2026

November 24, 2026 IN PROGRESS

Operations · Estimating and bidding · rated 4

Build this list and review it with Ray before December 6, 2026

December 6, 2026 With Ray Hartwell NOT STARTED

Operations · List every recurring decision, approval, or relationship that still r... · needs the conversation

Ask the leader of Office, payroll, and AP to walk me through their week, their metrics, and their headaches

December 12, 2026 NOT STARTED

Operations · Office, payroll, and AP · rated 3

Sit in on the Safety and compliance team meeting monthly, starting December 19, 2026

December 19, 2026 NOT STARTED

Operations · Safety and compliance · rated 6

Read every loan agreement and summarize the covenants in one page by December 25, 2026

December 25, 2026 NOT STARTED

Finance · I know the terms and covenants of our debt or line of credit — includ... · answered no

Schedule a standing quarterly lunch with Ridgeway Commercial Builders

January 6, 2027 With Ray Hartwell NOT STARTED

Relationships · Ridgeway Commercial Builders · transfer gap of 4 · rated 5

Analyze win/loss and discount patterns across our last 20 proposals or quotes

January 12, 2027 NOT STARTED

Finance · I understand how our pricing was actually set, and how much pricing p... · rated 5

Document how we do Bid invitation to submitted proposal, with the person who runs it, by January 19, 2027

January 19, 2027 NOT STARTED

Processes · Bid invitation to submitted proposal · rated 4 · not documented

Spend a full day inside Change order approval myself, before January 25, 2027

January 25, 2027 NOT STARTED

Processes · Change order approval · rated 5 · not documented

Take ownership of the next renewal or negotiation with this account

February 6, 2027 With Ray Hartwell NOT STARTED

Relationships · Sutter & Vine Development · transfer gap of 4 · rated 4

Have the process owner teach Monthly pay application and retainage to me, and then teach it back to them

February 11, 2027 NOT STARTED

Processes · Monthly pay application and retainage · rated 3 · not documented

APPENDIX

Appendix — the full record

Every question and every answer, so this document stands alone as a record of where you started.

Relationships

Name the 5 to 10 external relationships this business most depends on — customers, clients, partners, referrers, lenders. For each one, rate the relationship between that person and the current leader, and the relationship between that person and you.	Carolina DOT — District 3 · Public bid work; Ray knows the engineer · 9 · 3 Ridgeway Commercial Builders · General contractor, repeat sitework · 9 · 5 Sutter & Vine Development · Developer; we grade their subdivisions · 8 · 4 First Palmetto Bank · Line of credit and the equipment notes · 9 · 2 Trailhead Industrial Park · Owner's rep on a multi-year build-out · 7 · 6 McKinnon Ready Mix · Concrete supplier; I place the orders · 8 · 7 Greer Municipal Utilities · Utility work under an annual

	contract · 8 · 4 Ellison Bonding & Surety · Our surety agent; eleven years with Ray · 9 · 2 Anderson County Schools · Sitework on school projects, bid job by job · 6 · 5
Key people outside the part of the business I run know me and would follow my lead.	4/10
I have at least one experienced outside advisor or mentor who has led at the level I'm stepping into.	No
I have my own relationships with our bank or lenders and our key professional advisors — attorney, CPA.	6/10
I know our top competitors' leaders and their companies — or I have peers who do.	4/10
I'm known in our industry — associations, conferences, trade groups — as a coming leader of this company.	5/10
Our most important customers or clients know a transition is coming and are comfortable with me.	No
If the current leader disappeared tomorrow, our key external relationships would carry over to me without damage.	4/10
Which internal relationships are strained or untested?	Terry Poole · Never worked together directly, and they have been here longer
I have relationships with the political, civic, and community figures that matter to our business. List those key individuals here.	3/10 — Chamber and the county council chair, both through the current leader rather than through me.

Operations

List every major function or department in this business, and for each one rate your firsthand understanding — have you actually worked in it, or only heard about it?	Estimating and bidding · 4 Grading crews · 9 Paving crews · 8 Equipment and shop · 7 Office, payroll, and AP · 3 Safety and compliance · 6
List the parts of our operations you believe produce the highest margins, and the parts you believe consume resources without returning much.	Grading crews · high-margin Bid invitation to submitted proposal · drain Estimating and bidding · high-margin Equipment and shop · drain

List the parts of this business you believe are most fragile, and separately, the parts you believe are most resilient.	Bonding capacity, which rests on Ray · fragile One ready-mix supplier · fragile Terry does all the estimating · fragile Grading crews · resilient Equipment fleet and the shop · resilient
I could explain how we deliver our product or service end to end — including the steps I've never personally performed.	7/10
State our real capacity limit in concrete terms — units, hours, clients, jobs, revenue, whatever governs — and name what would have to change to raise it.	Our real limit is crew and machine hours in the peak months. Raising it means hiring ahead of the work, which we have never done.
List the suppliers, vendors, or partners we could not easily replace, and why each one is hard to replace.	McKinnon Ready Mix · Only supplier inside a 40-minute haul Ellison Bonding & Surety · Our bonding capacity is their relationship with Ray Upstate Equipment Rental · Holds our shortfall in peak season
I know the numbers this business is actually run by, and I could tell whether this month was good or bad without being told.	7/10
I have made a real operational decision with consequences — and lived with the result.	Yes — Yes — and I could point to a specific example if asked.
I understand how our technology, software, systems, and equipment support — or limit — our operations, and what the next needed investment is.	9/10
Where will AI most change how this business operates, sells, and competes over the next five years — where does it threaten us, and where could it give us an edge? Name what we are actually doing about it today.	Estimating first — takeoffs and bid leveling are exactly the work it is good at, and whoever gets there first in this market bids more work with the same people. We are doing nothing today, and I do not know what our competitors are doing either.
List every recurring decision, approval, or relationship that still runs through the current leader personally. For each one, mark when it moves.	Final pricing on anything unusual · at The Carolina DOT — District 3 relationship · before Bank and lender conversations · at Hiring above a certain level · before Whatever Ray decides to keep · stays

Sales

Write our unique value proposition in one or two sentences, the way a customer would hear it.	*Not answered*

Describe our ideal customer or client specifically enough that our team could tell a good-fit prospect from a bad-fit one.	*Not answered*
Map the steps of our sales cycle, from first contact to closed business.	*Not answered*
Name our key sales metrics and enter the approximate current value of each.	*Not answered*
Name the top three reasons we lose deals, and the stage where we most often lose them.	*Not answered*
From memory, list our top five customers or segments and your best estimate of what percentage of revenue each represents.	*Not answered*
I have personally sold, or closed, or been directly responsible for revenue in this business.	*Not answered*
I know how our salespeople are compensated, and whether the incentives drive the behavior we actually want.	*Not answered*
I understand our marketing and where our leads genuinely come from.	*Not answered*
I know our customers' perception of us — not just what we say about ourselves.	*Not answered*
If our top salesperson or biggest rainmaker left, I would know what to do.	*Not answered*
State our pricing and discounting rules as you understand them, including who currently has authority to deviate and by how much.	*Not answered*
List the three to five reasons our customers or clients buy from us again, and for each one, name who or what inside the business actually delivers it.	*Not answered*

Finance

Name the 5 to 8 numbers you personally watch to know whether this business is healthy — and enter the approximate current value of each, from memory.	Backlog, in months of work · about 7 Gross margin on grading work · 22% Equipment utilization · no idea Days sales outstanding · Labor as a share of revenue · roughly a third
I could walk a banker or investor through our income statement, balance sheet, and cash flow	3/10

statement, and explain what they say about the health of this business.	
I know our gross margin by product line, service line, customer segment, or engagement type — and which ones actually make money.	4/10
I understand our cash conversion cycle — how long it takes from spending a dollar to collecting it.	5/10
List, in order, the levers you would pull if cash got tight — and the early warning signs you would watch for.	Slow down discretionary spending · lever Chase receivables harder · lever Talk to the bank · lever Receivables ageing past 60 days · signal Payroll feeling tight · signal
I know the terms and covenants of our debt or line of credit — including what would trigger a default or a call.	No
I understand how our pricing was actually set, and how much pricing power we really have.	5/10
I know our largest cost as a percentage of revenue — labor, materials, cost of goods, or whatever dominates in our business — and what "good" looks like in our industry.	*Not answered*
I have been part of a real capital allocation decision — deciding where the next significant dollar goes.	*Not answered*
I know what this business is worth, and the basis of that valuation.	*Not answered*
I understand our ownership, entity, and tax structure well enough to ask informed questions of our CPA and attorney.	*Not answered*
List our major financial risk exposures as you understand them — insurance coverage, customer or supplier concentration, personal guarantees, credit or capacity limits.	*Not answered*
I have personally owned a budget and been accountable for the variance to it.	*Not answered*

Processes

List the 5 to 10 processes that produce most of the value in this business — for example, inbound lead to sales proposal. For each one: is	Bid invitation to submitted proposal · no · 4 Awarded job to mobilised crew · yes · 9 Daily production reporting · yes · 8 Change order approval · no · 5

it documented, and how well do you understand it?	Monthly pay application and retainage · no · 3 Equipment maintenance scheduling · yes · 7 Subcontractor onboarding and insurance · no · 5 Job closeout and punch list · yes · 8
For our three most important processes, write down the judgment calls and tradeoffs inside each one — the decisions that require experience, not just the steps.	Bid invitation to submitted proposal · Knowing when to walk away from one. That read lives entirely with Ray. · Speed now against a relationship we may need next year. Awarded job to mobilised crew · Sequencing under pressure — what moves first when everything is due at once. I can do this one. · Finishing one job late against starting three on time. Daily production reporting · I am guessing. I know the steps and not the calls, which is the point of this row. · Not yet known — this is what the conversation with Ray is for.
Which of our critical processes, if any, are overly dependent on a single person? List them.	McKinnon Ready Mix · Only supplier inside a 40-minute haul Ellison Bonding & Surety · Our bonding capacity is their relationship with Ray
If the current leader were unavailable for 60 days, every critical process would keep running without them.	No
I know our core systems and software, what each one does, who administers it, and where the data lives.	7/10
I have personally improved or rebuilt one of our core processes, and I can point to the result.	8/10
Name where you believe each of our top three processes would break if volume doubled, and what the current bottleneck is.	Bid invitation to submitted proposal · It would break immediately; nobody owns it Awarded job to mobilised crew · People, not systems — we would need another crew or another reviewer Daily production reporting · People, not systems — we would need another crew or another reviewer
We measure quality and error rates in our critical processes, and I know what those measurements currently are.	7/10
I know where our undocumented know-how lives — the things that are only in people's heads.	Yes
I know which processes are compliance-, safety-, or license-critical, and our current standing in each.	7/10
I could personally onboard and train a new employee into our most important processes.	8/10

Executive Readiness

Doing your current job well does not qualify you for executive leadership. Write down what you believe will be genuinely different about the next role — what you'll have to start doing, stop doing, and let go of.	*Not answered*
Name your top two or three strengths, and for each one name its shadow side — the way that strength can harm people if you rely on it alone.	*Not answered*
Describe the last piece of hard feedback you received, who gave it, and what you changed as a result.	*Not answered*
Which two of the eight influencing styles most describe how you actually move people? Which two are least like you?	*Not answered*
Have you been stress-tested — given a responsibility beyond your current role where visible failure was possible? Describe it.	*Not answered*
Write the case for where this business should go over the next five years — in your own words, not the current leader's.	*Not answered*
I have made a decision that a meaningful number of people disagreed with, communicated it, and held the line.	*Not answered*
Name the three parts of executive leadership you're least confident about.	*Not answered*
Do you know how the people who run this business day to day — and the wider team — would react to the announcement that you are the successor?	*Not answered*
Have you and the current leader agreed what their role will be after the transition — title, presence, which decisions stay theirs, and for how long? Describe what has actually been agreed, not what you assume.	*Not answered*
How will you know, twelve months after the transition, whether you are succeeding? Name the specific indicators.	*Not answered*
I have deliberately developed my own knowledge of this industry beyond what my job	*Not answered*

requires — reading, associations, peers, conferences.	
What are you most afraid of, or most uncertain about, in this transition?	*Not answered*

Team

List the 5 to 10 people inside this business who most drive results, and the people who most carry the culture through their behavior and attitude. For each one, rate the strength of their relationship with the current leader, and with you.	*Not answered*
Who would you least want to lose in the first year after the transition? List them in order.	*Not answered*
List each of your future direct reports. For each one, rate how well you know what they want from their career, what would make them leave, and how they prefer to be led.	*Not answered*
Who are the most promising young performers who could be the next generation of leaders after you?	*Not answered*
Have you personally both hired and fired someone? Describe each.	*Not answered*
Write the three to five behavioral statements that most define the culture of this company — what people here actually do, not the values on the wall.	*Not answered*
Which relationships among the people you will lead are strained, untested, or competitive — including any relationship where someone else expected to be chosen?	*Not answered*
I have had to deliver difficult news or a difficult performance conversation, and I did it directly rather than avoiding it.	*Not answered*
Name the roles that would be hardest to replace if the person left tomorrow — and whether anyone inside could step into each one.	*Not answered*
How do you think your future team would describe your leadership today — strengths and frustrations?	*Not answered*
I know how compensation, promotion, and performance decisions currently get made here	*Not answered*

— and I could defend them.

What will you communicate to the whole organization in your first 30 days as the new leader, and how?	*Not answered*