CASE STUDY 06 / RESEARCH & AUTHORSHIP / ADVISORY CONCEPT

Making Business Succession More Transparent Through Technology

Small-business succession and M&A

THE BUSINESS CHALLENGE

Owners of traditional businesses often lacked centralized records and documented workflows, making operational value difficult to demonstrate and buyer risk difficult to assess.

THE WORK PERFORMED

01 Market and succession analysis. Examined retirement-driven business transfers and the risks created by low digital maturity and undocumented operations.

02 Seller-side value assessment. Mapped how CRM, centralized records, repeatable workflows and automation could improve the evidence available to buyers.

03 Buyer-side technology diligence. Developed questions for assessing operational systems, data quality, technology gaps and post-acquisition risk.

04 Practical playbook development. Wrote complementary books addressing preparation for sale and acquisition followed by modernization.

05 Prompts and implementation thinking. Created assessment prompts and modernization pathways to help owners identify priorities and potential returns.

06 Advisory model. Outlined how Green Teaming could work alongside business-sale and acquisition professionals; no transaction outcome is claimed.

THE RESULT

Produced two complementary educational guides and a consulting proposition for business buyers and sellers. Improved transaction prices or acquisition returns are potential benefits, not measured outcomes.

2
complementary guides

WHAT THIS EXPERIENCE PROVES

Demonstrates research-led strategy and technology diligence for business transitions; the outputs are educational frameworks, not completed M&A transactions.

BEFORE / TRANSFORMATION / AFTER

BEFORE	TRANSFORMATION	AFTER
Undocumented operations obscured business value and increased buyer uncertainty.	Developed paired playbooks for technology-enabled selling and post-acquisition modernization.	Buyers and sellers gained a framework for assessing digital readiness and value opportunities.

SELECTED CAPABILITIES

Market assessment | Business strategy | Technology assessment | Modernization roadmaps | Content creation | Prompt engineering

Experience: Tracey DeLeeuw | Experience and venture descriptions reflect the founder interview. No additional client outcomes are implied.

Could your organization benefit from similar work? team@greenteaming.ca | LinkedIn: Green Teaming