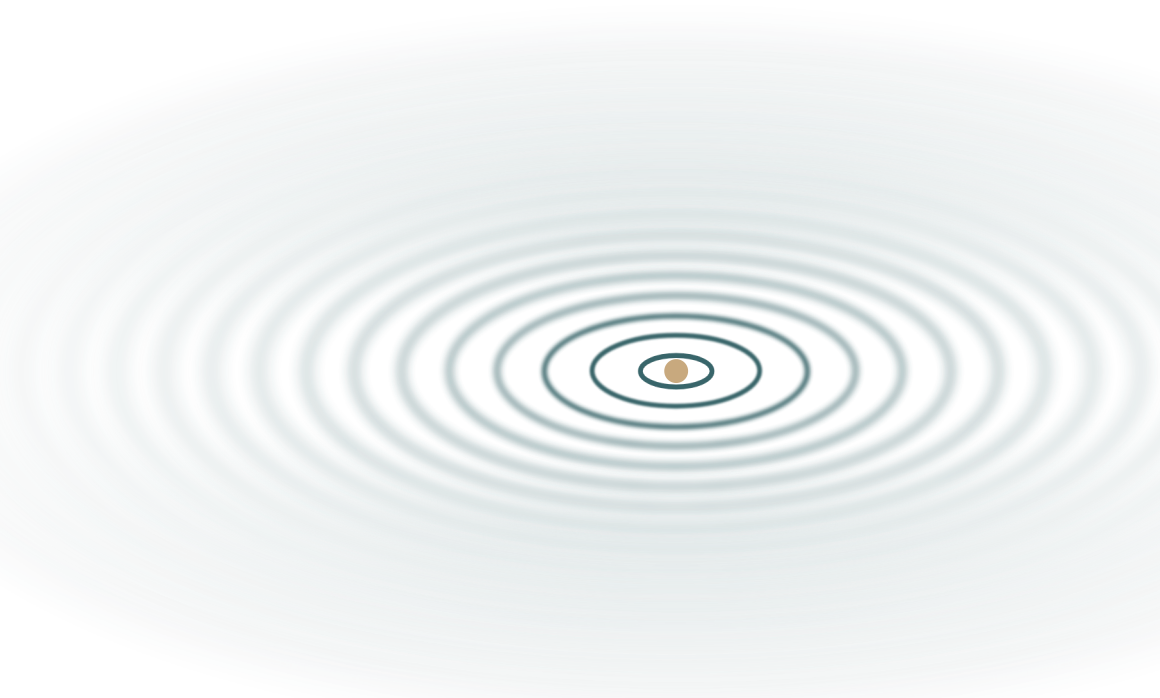




THE CLARITY REFUGE
VANCOUVER · BRITISH COLUMBIA

Clarity Memo

for Daniel



FROM Sebastian Schilling
BASED ON A conversation on the trail · voice note · key facts · three outside views
NOTE Sample with an invented client

Dear Daniel,

Thank you for the walk, for your openness, and for trusting me with both the figures and what sits behind them. This memo is my reading of our conversation: direct rather than diplomatic, and not a verdict. Where I am wrong, please tell me.

You came to talk about succession. We spent a good part of the time on something else: how much of the firm still runs through you, and what that costs you. You asked me not to hold back, so I have not. Part 2 is personal. Read it when you have the space for it.

One thing up front: parts of your story are close to my own, and that is the lens I read it with. Weigh my recommendation with that in mind. I am not a therapist, and the figures are a rough model from our conversation, not tax or financial advice.

AT A GLANCE

1. **Who you are.** The person everyone calls when it gets difficult. Clients, staff and your partner trust you because you have never left anyone alone with a problem.
2. **What weighs on you.** Not the work itself, but that everything important still ends up on your desk. When it matters, you carry it yourself.
3. **Why it matters now.** You want the next ten years to look different. A sale or a successor will only change that if you stop being the safety net.
4. **The path.** Appoint a managing director within eighteen months and move into the chair. A sale stays possible later, on better terms, once the firm runs without you.
5. **The next steps.** Three conversations: with Maria, with Lena, and with yourself about what you will let go of first.

What I heard

You came with a succession question. Underneath it is a question of weight.

You asked whether to sell the firm in the next three years or to find someone to run it. You are fifty-eight, twenty-two years in, and the firm is healthy. On paper there is no urgency. In your voice note there was:

I don't want to be the one who still signs off on every drawing at sixty-five. I want to be useful, not indispensable.

DANIEL · VOICE NOTE

What you described is not retirement. Your ideal week still has clients in it, a few hard technical problems and time for younger engineers. What you want to lose is the feeling that nothing important happens without you.

What others see in you

Your partner Lena values your judgment and your calm in a crisis. Maria describes a man who is generous with everyone's time except his own. A friend of thirty years wrote one line:

He is the most reliable person I know. I just wish he relied on someone else once in a while.

A LONG-TIME FRIEND

Asked what you avoid, all three, separately, pointed at the same thing: handing over before you are sure it will go well.

What lies beneath

THE PATTERN

When it matters, you carry it yourself. Handing over feels like letting people down.

You told me about three moments. The large project that went wrong in 2015, when you worked nights for four months instead of bringing in help. The two engineers you trained as your successors, who both left after you kept the final decisions. And the year your father was ill, when you ran the firm and his care at the same time and told almost no one.

My reading: you know two ways through. The first is to carry it yourself, and it has worked for twenty-two years. The second, when the load gets too heavy, is to hand over completely and step back, as you are now considering with a sale. What rarely happens is the third way: hand over, and stay close enough to help without taking it back.

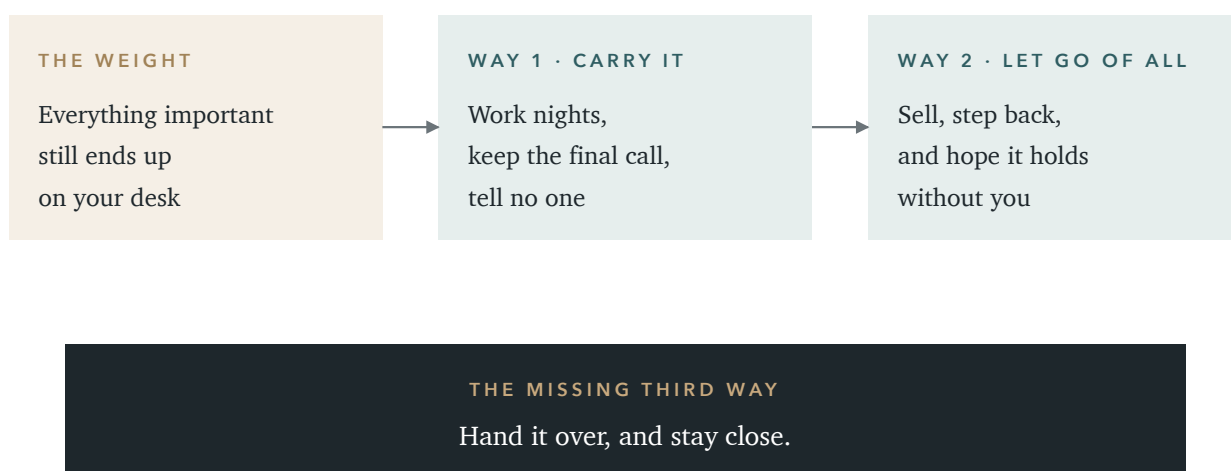


FIGURE 1 Two ways that have worked for you, and the one the next step needs. A reading, not a verdict.

The rules you carry

I hear a few rules in how you talk about the firm: *a good engineer checks everything twice; if you ask for help, you have failed; the founder is the last one to leave.* The first made the firm what it is. Which of the others still hold?

THE PARADOX

The one everyone relies on has no one to rely on.

Your reliability is the reason clients stay and staff join. It may also be the reason your two successors left: there was never room for them to be relied on. A managing director will take the operational load off you. But the relief you describe will only come if you let someone see you uncertain, and let them carry part of the weight.

Two blind spots.

1 · Maria is planning a different decade than you

You spoke about the firm's future in detail and about hers in one sentence. She may have more to say about the next ten years than you expect.

2 · Lena is waiting to be asked

You described her as “not a manager”. In her outside view she wrote that she would like more responsibility, if it came with real authority. That is worth a conversation before you search outside.

The path that fits you

Keep the firm. Appoint a managing director. Move into the chair.

We ran your key facts through a simple model: about 9.4 million in revenue, a margin of 11 percent, your share of 80 percent. The hard facts are only half of this decision, but they matter:

WHAT REACHES YOU PER YEAR · ILLUSTRATIVE · CAD THOUSANDS

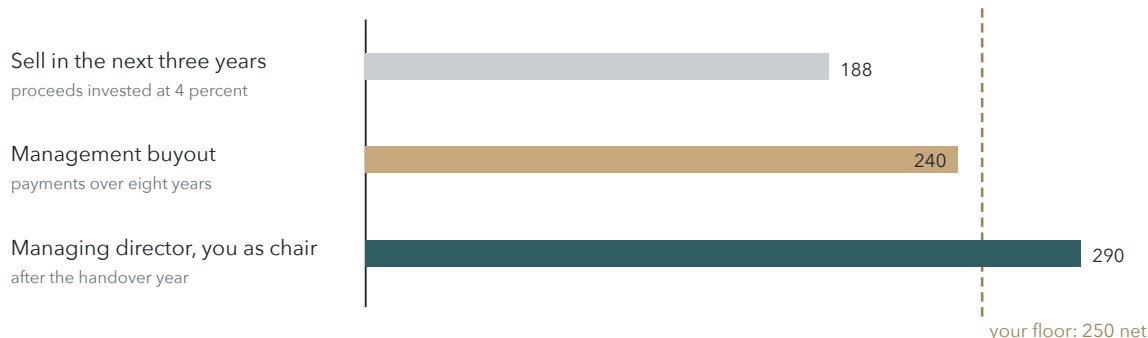


FIGURE 2 Invented figures for this sample. In a real memo, the model is built on your own data and handed over, so your adviser can check it.

The options, in order

RECOMMENDED NOW

1

A managing director runs the firm, you move into the chair

A real managing director who owns operations, people and the final technical sign-off on most projects. You keep the client relationships you love, the strategy and the board. It matches your ideal week, keeps the team together, and keeps a sale open on better terms later.

LATER, ONCE THE DIRECTOR DELIVERS

2

A management buyout, led by Lena and the new director

It fits a firm that people want to stay in. Today the firm would struggle to carry the payments. With a proven director and two good years, it can.

POSSIBLE, NOT NOW

3

A sale to a larger engineering group

Today a buyer would pay for a firm that depends on its founder, and would want you on an earn-out for years. That is the opposite of what you came for.

Next steps

Three steps I recommend.

1 • Ask Maria before the plan is finished

With questions, not a solution: *What do you want the next ten years to look like? What would you need from me?* Write down her words, not your reading of them.

2 • Offer Lena the conversation she is waiting for

What responsibility she wants, with what authority, and how she would see a director from outside. Nothing in this plan works without her.

3 • Choose one thing to let go of this month

One decision you would normally take yourself, handed over completely, and not taken back. Then notice what happens, in the firm and in you.

The marker: by the end of the year, the director role is written down and the search has a start date.

The trap: waiting until you are sure a successor will do it as well as you. That moment does not come. It is human, and worth noticing.

LAST THING

How I see you.

When I think of you, I think of reliability, care and craft. You built a firm that people trust with things that must not fail. The next step is not to care less. It is to let others carry some of it, so the firm can become what you built it to be: something that holds without you.

Sebastian

This is a sample. Daniel, his firm, all names, quotes and figures are invented. A real Clarity Memo is written for one person only, after the intake and the conversation, and it is never shared.